# New Features Guide

04/27/2017 Blackbaud CRM 4.0 New Features US

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# New Features for Blackbaud CRM 4.0

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Before you upgrade and begin to use ***Blackbaud CRM 4.0***, take a moment to review the following information that highlights new features and changes to existing features. We also recommend you review information about CRM 4.0 Service Pack new features. It is important to share this information with ***CRM*** users in your organization.

***Note:*** In addition to the PDF, we also provide Microsoft *Word* versions of each New Features Guide for ***Blackbaud CRM*** 2.91 and higher. You can download a *.zip file of these documents to easily copy and reorganize the content to best suit your needs. The conversion of these PDF files into *Word* does not always maintain consistent formatting, so there may be slight irregularities.

# ClickOnce Support

Blackbaud will support ClickOnce ("Smart client") through the end of support for ***CRM*** version 3.0, which is expected to conclude December 31, 2016. The 4.0 ***CRM*** release does not include support for ClickOnce.

The replacement interface, WebUI, is the sole interface supported in this release and will be the only one supported in future versions. WebUI was first introduced in ***CRM*** version 2.93 released in May of 2012. As of the 3.0 release, all the functions available in ClickOnce are available in WebUI, have a functional equivalent, or were intentionally retired. Details of these changes are outlined in the *Introduction to WebUI Guide*.

ClickOnce on version 3.0, and all prior supported versions, will continue to receive the benefit of our quality assurance testing and maintenance corrections in both ClickOnce and WebUI, and we will seek to reasonably address any critical software defects related to ClickOnce in these versions.

Although we took precautions to avoid them, functionality differences may exist between WebUI and ClickOnce. If you notice differences, please contact our Support department so we can evaluate the best approaches to address the issues.

After you upgrade to ***CRM*** version 4.0, an error message appears when you use a ClickOnce link. The message explains that the link is no longer valid and that you should contact your system administrator for a new one.

***Tip:*** We recommend system administrators proactively distribute the WebUI link and instruct users to update their direct links, such as those saved to web browser favorites lists.

# Upgrade Considerations: Tasks and System Roles

In ***Blackbaud CRM 2.91*** and subsequent versions, we made enhancements to several of the main functional areas, including *Events*, *Prospects*, and *Memberships*. Before we made these enhancements, you could customize the functional areas by assigning tasks to a system role. These tasks then

appeared on the functional area. You could also specify which task groups they should appear in, such as under **Configuration** or a custom task group you created. This was an easy way to offer "shortcuts" to users that would appear in the functional areas they could access.

These functional areas were converted to actual pages to improve functional flexibility and overall usability. While you cannot assign tasks to pages, pages can have actions. After you upgrade, you will need to re-create any tasks as actions and add them to these pages. To add actions to these pages, you must edit the page properties while in design mode.

Most tasks are available as actions, except for BrowseQueryResults and RunBusinessProcess. In addition, you can now take advantage of the actions ActionGroup, ExecuteCustomSectionMethod, and InvokeSectionModelAction, which are not available as tasks.

You can create custom action groups, similar to custom task groups. When you create a custom action group, you can choose where to display it on the screen. By default, custom action groups appear on the left side of the screen above the Shortcuts, Recent searches, and Recently accessed lists. To change the placement of the action groups, click **Edit action groups** in design mode. Select the action group you want to edit and use the RenderLocation field on the Action group screen to change the location. Placement for the action group defaults to "ExplorerBar," which places the action group on the left side of the screen where the group was located before. However, you can select "Tab" if you want the action group to appear on the page instead.

***Note:*** If your organization has not assigned tasks to system roles, you do not need to take additional action for this after you upgrade.

If you organization has assigned tasks to system roles, you will need to re-add these as actions to place on the *Events*, *Prospects*, and *Memberships* pages.

# Before You Upgrade

Before you upgrade and begin to use ***Blackbaud CRM 4.0***, we recommend you review information about ***CRM 3.0*** Service Pack new features, in addition to all other relevant new feature information. For more information about Service Pack new features, refer to Chapter 2 in the 3.0 New Features Guide.

You should commit all open batches before you upgrade to ***CRM 4.0***.

# Online Help Panel

With this release, we made significant enhancements to our Help offering.

We designed a tabbed panel to bring online Help topics directly into the program. The new Help Panel offers improved usability with a modern update. When you click **Help**, a panel appears from the right side of your screen and displays content specific to your page or screen.

With the new Help Panel, you can quickly access:

- New feature content
- The latest, most up-to-date Help topics from service pack new features and additional content improvements
- Feature videos

You can also:

- Undock the Help Panel to click and drag the help to a different position
- Click breadcrumbs to find your way back to your original topic
- Use navigation buttons to go back and forth in your Help Panel history
- View improved images

***Tip:*** To accommodate the new placement of the **Help** button, we relocated several links. On the Home page, the **Customize** link now displays next to **Home**. Where applicable, navigation trees display next to a page name. Finally, **About Blackbaud CRM** now appears in the Welcome menu. For details about these new locations, see General Features on page 43.

# Configure Help Type

With this release, the online Help Panel is available and is set as the default help type.

However, to continue using customized Help topics for your organization, your system administrator has the option to revert back to the Help topics installed with the program.

From the Administration page, under **Configuration**, click **Configure Help Type**. The Configure the help type screen appears.

In the **Select help type** field, you can choose between the following options:

- **Use the Help Panel - which disables Help customizations** - This option is set as the default Help type after you initially install or upgrade. This option allows access to new feature content, the latest Help topics from service pack new features and additional content improvements, and feature videos.

  A tabbed panel brings online Help topics directly into the program. When you click **Help**, a panel appears from the right side of your screen and displays content specific to your page or screen.
- **Use legacy Help - which keeps Help customizations** - This option allows you to continue using customized Help topics for your organization. You have access to the legacy Help topics installed with the program as well as your customized Help topics. The Help button appears in the same location as in previous releases. For more information about customizing Help topics, see the *Customize Help for the Infinity Platform Guide*.

After you make a new selection and click **Save**, you must refresh your browser and log in again.

***Warning:*** You cannot use a combination of both Help types - you must select one or the other. Your selection will be the default for future upgrades. Also note that the new Help Panel is not compatible with the tools used to customize the Help file. Blackbaud will continue to explore a supported model of custom Help file content as a modern, cloud-based software provider. When available, we anticipate the ability to convert Help topic content into the new model.

## Help Panel Glossary

With this release, a glossary has been added to the help file. This glossary contains definitions for terms that are important to know or concepts that are difficult to understand and will help provide context throughout the help panel.

Glossary terms appear in key locations within topics in the help file. To view the glossary term, hover over it with your cursor. The definition appears.

# New Code Tables and Configuration Tasks

To enable some features in the program, you must complete configuration tasks. These tasks appear under **Configuration** on pages throughout the program. In addition, some system-wide configuration

tasks and features appear in *Administration*. If a new feature includes a code table, you may want to determine the values to use with the code table. This release includes the new configuration tasks and code tables below.

***Note:*** We recommend that you review the entire new feature documentation to determine how new features affect your organization.

## New Code Tables

This section provides a list of new code tables added for this release. To help you locate each new table, we provide the area of the application where table entries can be added.


- Research Lists on page 59
- Additional Household Information from Experian on page 65


## New Configuration Tasks

This section provides a list of new configuration tasks added for this release. To help you locate each new task, we provide the area of the application where each task is located.


- Anonymous Recognition Options on page 89
- Recurring Gift Status Changes on page 94
- Communication Templates on page 33
- Communication Name Patterns on page 36
- Configure Help Type on page 12


## Enhanced Configuration Tasks

This section provides a list of configuration tasks and other feature configuration settings that have been enhanced for this release. We recommend that you review the changes and evaluate how they affect your organization. The changes may require updates to your configuration.To help you locate each enhanced task, we provide the area of the application where each is located.


- Post Membership Installment Plans on page 50


# Administration

## Save As Option for Export Definitions

A new **Save as** option is available when you create and edit export definitions on the Export definitions page in *Administration*. This allows you to change existing export definitions while they are

open and save them as new definitions. Previously, you copied definitions to create new versions of them. This enhancement reduces the number of steps to update existing definitions so you can work more efficiently.

# Filter the Organization Calendar by Event Tasks

When you use the Events filter for the organization calendar, you can now select **Show tasks** to include the event's related tasks. Select **Include completed tasks** to also include completed tasks related to the event.

# Batch

## Column Widths in Batches

When you resize a column width in a batch template, the adjusted width remains in place for that template until you resize it again. For example, if you widen the size of a column, the next time you use that batch template the column is displayed in the new size instead of the default size. Previously, the column size did not save and reset to the default each time you accessed the template. This is a per-user setting, so your width changes do not carry over to other uses of the program.

## Edit Recognition Credits in Batch

Recognition credits currently provide flexibility for crediting constituents for a transaction. For example, you can credit additional constituents for the revenue and decide how much credit each constituent receives. With this release, you can now edit recognition credits associated with commitments, such as pledges or recurring gifts, when added through an Enhanced Revenue Batch and a Revenue Update Batch. This enhancement adds greater flexibility and a more streamlined data entry experience.

To edit the recognition credit for a commitment from the Revenue tab of the batch data entry screen, select a payment row and click **Recognitions** on the toolbar.

From the Recognitions screen, you can change or add additional constituents.

For commitments associated with multiple applications, from the Recognitions screen, you must first click **Assign recognitions** before you can edit or add new recognition credits.

# Apply to Commitments Screen in Batch

With this release, we made several enhancements to the Apply to commitments screen accessed from an Enhanced Revenue Batch and Revenue Update Batch. These enhancements improve the use and efficiency of this screen.

***Show Me:*** Review the walkthrough to learn more

- To view a large amount of information at one time, you can now click the maximize button in the top right corner of the Apply to commitments screen. Once maximized, to return to the default screen size, click maximize again. To manually resize the screen, you can click and drag any corner of the screen.
- Use new search filter options to filter the list of the constituent's existing commitments based on designation lookup ID or name, constituent name, or amounts. You can also filter across due dates.

  ***Note:*** This filtering only searches through the constituent's list of existing commitments. To search for commitments owned by other constituents, click **Load commitments** on the action bar.

- Previously, the **Description** column displayed the designation or event lookup ID as well as the associated constituent name. For easier identification and sorting, the **Description** column now displays the designation or event lookup ID and the new **Constituent** column displays the associated constituent name.

  ***Note:*** When upgrading, note that these usability enhancements also apply to existing batches.

- To quickly locate information, you can now sort the grid by clicking any column header.
- The commitments grid now supports pagination. Use the **Page** field and page arrows to easily navigate between groups of commitments. The grid displays 25 commitments per page.

# Action Bar for a Batch Row

We enhanced the action bar for a batch row for all batch types. On the Uncommitted Batches tab, click the double arrows next to a batch to expand its row. From the action bar that appears, we removed the **Edit** drop-down button that previously included **Edit batch** and **Edit properties**.

With this release, we added the **Edit batch** and **Edit properties** buttons directly to the batch action bar. This saves time by eliminating an extra click when you need to edit a batch or its properties.

# Batch and Import Guide Enhancements

With this release, we made a significant investment in improving the quality of our existing User Education resources. One such area of improvement focused on the *Batch and Import Guide* and associated help file content.

The following list highlights several of our enhancements:

- We tested and updated content to ensure accuracy and provide a more logical flow of information.
- We created new How-To videos to visually enhance your understanding of *Batch* and *Import*.

  ***Show Me:*** Watch this video for a high-level overview of Batch

  ***Show Me:*** Watch this video for a high-level overview of Import

  ***Show Me:*** Watch this video to learn how to apply payments to commitments in Batch

- We added a new "Big Picture" chapter that offers an overview of *Batch* and *Import*, and describes how they work together to save time and promote consistent data management.

Batch and Import: The Big Picture

Full Circle View ..... 1
Life of a Batch ..... 2
Life of an Import Process ..... 5
Tips and Considerations ..... 7

  This chapter also illustrates the life cycle of a batch and import process, and provides tips and considerations to enhance your workflow.

- To help you more clearly understand the validation process, we added more detail to our list of validation errors and the reasons for their occurrence.

## Batch Validation

Batch validation helps your data remain consistent and error-free.

Validation occurs at different times during data entry. When you enter batches manually in **Batch entry**, the program flags simple errors as you enter data and more complex errors once you save the batch. To initiate validation at any point during data entry, click **Validate** on the toolbar of the data entry screen. When committing a batch, on the Commit parameters screen, you can also select **Validate batch before committing**.

The list below includes examples of validation errors and their solutions:

### Missing required fields

For missing required fields, ensure the field is populated. In other cases, you may need to deselect the field as required when customizing fields for the batch. For more information, see Customize the Fields in a Batch on page 70.

### Incorrectly formatted fields

When incorrectly formatted fields exist, a red X appears in your batch data entry row. A common formatting error is an incorrect email address.

### Duplicate constituents

Ensure duplicate constituents do not exist in your database. For more information, see Resolve Duplicate Constituents in a Batch on page 118.

### Account or account segment errors

Ensure the GL mapping is up-to-date or the segment is defined. For more information, see the *GL Setup Guide*.

## Batch Lockdown for Credit Card Processing

When you run a Credit card processing process, we now lock the batch while the cards are being processed so that a user cannot change information about a transaction that has already been sent to the ***Blackbaud Payment Service***. After the cards are processed, the batch is unlocked. Previously, the batch was not locked and payment information could be changed while the cards were processed which could cause a mismatch between the transaction information in ***CRM*** and in the ***Blackbaud Payment Service***.

# Constituents

## Constituent Record Redesign

We have redesigned the constituent record to make it easier and faster to find information about your constituents. The record now includes summary tiles where the summary section used to be, and information that was previously accessed through the left navigation is now easily available within the record itself.

## Constituent Tiles

The constituent record now includes summary tiles where the constituent summary section used to be. You can add and edit constituent information from the tiles, and you can use them to quickly navigate through the record.

Tiles and the related tabs are linked. When you click a tile name, the related tab opens. Some tiles may include links to other constituent records. For example, for a household record type, you can use the Members tile to open the individual records of the constituents included in the household.

Some tiles also include multiple pages of entries. For example, if a constituent has more than one address, you can use the arrows on the Addresses tile to view each address.

Above the summary tiles, the record type, lookup ID, and active constituencies are always visible. Important notifications, such as deceased status, also appear above the tiles.

For each constituent record types, users can customize which summary tiles appear as well as what order they appear in. This setting is saved for your user account the next time you access a record or log in.

There is no limit to how many tiles you can choose to view. Tiles wrap to fit your screen size. To select what tiles appear and in what order, click **Customize tiles**.

To hide the tiles for ease of navigation, click **Show less**. When tiles are hidden, click **Show more** to display them again.

***Note:*** Users who had security access to the summary section of constituent records can see all tiles in the new layout. This is true even for tiles that have information about sections of the program that the user may not have access to. For example, if a user has rights to see the constituent summary section but no rights to see membership information, they will still be able to see the new Membership tile on constituent records.

If you have a customization for the constituent summary section that has replaced the standard data form with a custom data form, the upgrade will not overwrite your customization with the new tiles. However, if you wrote an extension to the data form, the upgrade will replace your extension with the new tiles. To customize the section, you must rewrite the extension.

# Constituent Record Tabs

In order to make it easier to find the information you need about your constituents, pages that you previously accessed from the More information or the View as area on the left navigation are now part of the main record tabs. On a constituent record, there are now new tabs that incorporate this information in a central place.

To make it easy to navigate this information, we made some enhancements to the way tabs work.

- You can now drag and drop tabs into any order you prefer. This is sticky setting, so it is saved the next time you access a constituent record. This allows you to organize the tabs in the order that most makes sense for your workflow.
- When you scroll through tabs using the right and left arrows at either side of the tabs, the tabs now scroll more quickly. This allows you to scroll through several tabs at one time and makes it easier to find what you are looking for.
- Most tabs now have second-tier tabs inside. This allows you to navigate through information within a section in a similar way to how you did inside pages such as the Relationships page. The second-tier tabs behave the same as first-tier tabs.

Below is a list of all tabs and pages currently in the application. Where appropriate, we have noted their previous location and second-tier tabs.

| Tabs and Pages | Previous Location | Second-Tier Tabs | Notes |
|---|---|---|---|
| Communications | Communications under More information | • Communications<br>• Appeals<br>• Preferences<br>• Newsletters | |
| Corporate Info | More information | No second-tier tabs | Only applicable to organization records. |
| Documentation and Interactions | Documentation Tab and Documentation Summary, Interactions, and Surveys under More information | • Constituent Documentation<br>• Interactions<br>• Surveys | |
| Fundraiser | View as Fundraiser | | This page is still accessible as a separate page. |
| Funds Received | Funds received page | None | Only appears for constituents who received funds. |
| History | History under More Information | • History<br>• Origin | |
| Personal Info | Personal Info and Constituencies tabs | • Personal<br>• Constituencies | We have consolidated the Personal Info and Constituencies tabs under the Personal Info tab. |

| Tabs and Pages | Previous Location | Second-Tier Tabs | Notes |
|---|---|---|---|
| Relationships | Relationships tab / View as Group member page | • Relationships<br>• Group Member<br>• Relationship Tree<br>• Extended Relationships<br>• Relationship Maps | |
| Sponsor | View as Sponsor | • Sponsorships<br>• Transactions | |
| Stewardship plans | Stewardship plan page | | |
| Vendor | View as Vendor | | |
| Volunteer | View as Volunteer | • General<br>• Availability<br>• Timesheets<br>• Awards<br>• Documentation | The previous Traits tab on the Volunteer page is now part of the General tab inside the Volunteer tab. |

***Note:*** If you have customizations on any of the pages that are now tabs on the constituent record, the upgrade will make those customized pages inaccessible. However, Blackbaud has created a utility your system administrator can run after the upgrade to copy the customizations to the new tabs. The utility is available on the Downloads page of the Blackbaud website or by contacting Blackbaud Customer Support.

# Other Enhancements to the Constituent Record

In alignment with the new design of the constituent record, we have made additional changes to the way tasks are organized on the page.

You can now mark a constituent as deceased or inactive from the Personal Info tab on the constituent record. For organization records, the option to mark the organization as inactive is now on the Organization Info tab. Previously, these options were located under **Tasks**.

# Constituent Search

When you click **Show advanced search options** on the Constituent Search screen, your selections under **Advanced search options** remain in place each time you access the screen. For example, when you select **Include deceased**, the checkbox remains selected and deceased constituents appear in results each time you open the screen until you clear the checkbox. These selections also carry over to the quick search bar at the top of every screen.

The advanced options you select are specific to your user account. Other users are unaffected and select their own advanced options.

# Campaign Filters for Constituent Revenue and Recognition Information

To help improve both performance and usability when viewing revenue and recognition information on constituent records, we have made an enhancement to the way the campaign filters on the Revenue Summary and Revenue History tabs work. When you view these tabs and you choose to view the information by "Selected campaigns," the Select campaigns screen now includes only campaigns the constituent has given to and, for context, the associated parent campaigns in the hierarchy. Previously, the campaign filter on these tabs included the complete campaign hierarchy even if the constituent did not give to the campaigns.

# Letter Owner

You can now assign an owner to a letter that you send to a constituent. When your user account is tied to the constituent, the new **Owner** field defaults to you, but you can assign a different user as the owner of the letter if necessary. To write a letter to a constituent, from the constituent record, click **Write a letter** under **Tasks**.

# Specific Date Range Filters on the Revenue and Recognition History and Summary Tabs

To improve performance and to give you a more precise view of information on the Revenue History, Revenue Summary, Recognition History, and Recognition Summary tabs of a constituent, you can now filter by "Specific date range" and select the exact start and end dates to use. Previously, you could filter by fuzzy dates only, such as "Last month" or "This calendar year."

# Constituent Data Hygiene Processes

## Constituent Merge Configuration for Employment History

You can now indicate if you want to merge employment history information when you merge constituents. You make this selection when you configure constituent merge settings.

From *Constituents*, click **Duplicates** under **Maintenance**. On the Duplicates page, click **Constituent merge** under **Merge constituents processing**. On the Merge Configurations tab, click **Add**. When you select Relationships, you see the new **Merge employment information** checkbox.

When this checkbox is selected, if there is conflicting employment information for the constituents to be merged, the merge includes all employment history in the target record, unless there are overlapping dates. Overlapping dates will cause an error when this checkbox is selected. When the checkbox is not checked, the merge does not copy any employment information for identical relationships in the records to be merged.

When you upgrade, existing constituent merge configurations now have this option and it is selected by default to merge employment information. New constituent merge configurations will also have this option selected by default.

# Data Warehouse

## Blackbaud Data Warehouse

The data mart has been re-named to Blackbaud Data Warehouse. There are no functionality changes as a result of this new name, but all screens now reflect this change.

To access the Blackbaud Data Warehouse, from *Administration*, click **Data warehouse**.

## Manage Attribute Categories and Smart Fields

You now manage attribute categories and smart fields directly from the data warehouse. Previously, you clicked **Select eligible attribute categories** or **Select eligible smart fields** on the Blackbaud Data Warehouse page under Configuration and you selected your preferences in a form. These options have been renamed to **Manage attribute categories** and **Manage smart fields**.

Once you select one of these options, on the Attribute Categories page or the Smart Fields page, you expand an item and click **Include in warehouse** or **Remove from warehouse** to manage whether they are included in the warehouse.

# Direct Marketing

## New Direct Marketing Effort Workflow

This release includes phase 1 of our improvements to the marketing and communications workflow. Our goal is to make the marketing effort process consistent and coordinated across all fundraising programs and channels, and able to scale for complexity. You will be able to track marketing data consistently and access compiled statistics for a constituent across all types of communications. You will also be able to create all types of communications using a common process which means fewer tools to learn and maintain within an organization.

Version 4.0 introduces communication templates to standardize and streamline the setup process for marketing efforts. Templates define default settings and simplify setup by including only the options you need to create a communication. For this release, templates are available for only direct marketing efforts. All other marketing efforts and communications, including marketing acknowledgements, membership renewals, appeal mailings, remain unchanged for now.

This is the new direct marketing workflow:

- System administrators configure communication templates and name patterns.
- Campaign analysts build marketing efforts based on templates. They add segments to the

marketing effort and configure any settings not defined and locked by the template.

- Campaign analysts execute the marketing effort and monitor its status.

## How Do We Prepare?

After your organization upgrades to 4.0, a system administrator needs to configure communication templates for users who execute marketing efforts. Setup and implementation of communication templates requires coordination among multiple roles at your organization. For example, this is one possible structure:

Business Analyst/Systems Analyst:

- Works with the marketing manager and campaign analyst to gather requirements for the types of direct marketing efforts you plan to create.
- Configures templates based on requirements.

Marketing Manager:

- Provides subject matter expertise for template configuration.
- Drives decisions around which defaults to use based on the fundraising program's requirements. For example, you can set default exclusions and export formats on a template. You must decide which values to use as defaults and whether to lock these settings or allow the campaign analyst to change them on the marketing effort.

Campaign Analyst:

- Provides subject matter expertise for template configuration.
- Runs test marketing efforts to validate template setup.

Blackbaud Professional Services:

- Provides product expertise.
- Guides best practice of configuration with the business analyst.

The program includes 3 example templates for direct marketing efforts. Your organization should review these templates to evaluate how well they meet your needs. You can modify the examples or create new templates.

## Communication Templates

Communication templates define default settings for direct marketing efforts and simplify the setup process by including only the options you need to create the effort. With communication templates, you can create direct marketing efforts that are as simple or complex as your organization needs. You can choose which features to make available for a direct marketing effort. For example, if your organization does not track KPIs, you can leave the KPIs grid blank and lock it so the KPIs tab is completely hidden for users who create marketing efforts based on that template.

The program provides 3 template examples you can evaluate and modify to meet your organization's needs. The program also includes an example name pattern used by the simple email and mail templates.

- Example Complex Mail Template: This is an example for sophisticated direct mail marketing efforts. All features are turned on and unlocked.
- Example Simple Email Template: This is an example for simple email communications. Features not typically used with email efforts are turned off. Other options, such as activation and export formats, are set to use the program defaults and locked.
- Example Simple Mail Template: This is an example for simple mail communications. Features not typically used with simple mailings are turned off. Other options, such as activation and export formats, are set to use the program defaults and locked.

To access communication templates, from the Marketing and Communications page, click **Communication templates** under **Configuration**. The Communication Templates page appears.

Click **Add**. The Add communication template screen appears. On this screen is a series of forms that walk you through the communication template setup process.

On the Select features and defaults form, you can configure features and settings for the marketing efforts that use this communication template. This form is divided into a series of tabs you can navigate between to set up various parts of the template.

On each tab, you can enter default values for fields on marketing efforts created from the template. For example, you can enter a default source code. You can also choose which fields are editable by users who create marketing efforts from the template. If a field is unlocked, users can edit its value on the marketing effort. If a field is locked, the field is hidden on the marketing effort and the value selected on the template is always used. If you lock all fields and options on a tab, that tab will not appear at all on marketing efforts.

On the Confirm and make active form, you can review the settings defined for the communication template and make changes before you make it available for use.

On the Communication Templates page, you can expand a saved communication template to quickly preview its settings.

# Communication Name Patterns

Communication name patterns allow you to generate unique but consistent names for all direct marketing efforts created from a communication template. When you configure name patterns, you select parts that build the effort's name. Some parts are dynamic and populate automatically when a user creates an effort. For example, if you include the Appeal code or Channel part, those values pull from the appeal or channel assigned to the communication template. Values for Static identifier and Counter parts populate automatically when a user creates a new effort. If you include a Free-form part, the user who creates the marketing effort must enter a text value for that part of the name.

***Tip:*** Configure name patterns before communication templates.

To access the Communication Name Patterns page, from the Marketing and Communications page, click **Communication name patterns** under **Configuration**. The **Communication name patterns** grid displays the name patterns saved in your database. From this grid, you can edit existing name patterns or add new ones.

To create a new name pattern, click **Add**. On the Add communication name pattern screen, select parts for the name.

When you configure a communication template, you can select a name pattern to apply to all marketing efforts created from that template.

On the direct marketing effort, complete any parts missing from the name pattern.

# Copy Segments From Another Marketing Effort

Segments that perform well are often used for multiple marketing efforts over time. To reuse segments in earlier versions, the only option was to copy an existing marketing effort. Now that direct marketing efforts are created from templates, we added the ability to copy segments from an existing marketing effort to a new marketing effort. This is helpful when you want to reuse segments with a marketing effort that uses different settings than the original.

From Segments tab of an unactivated direct marketing, membership renewal, or sponsorship effort, click **Copy from another effort**. Select the marketing effort with segments you want to copy. The copied segments appear on the Segments tab below any segments already added.

Notes about copying segments:

- The copy process includes all segments from the selected effort, including test segments.
- You can only copy segments with the same base currency.
- You can only copy segments from marketing efforts of the same type. (i.e., you cannot copy segments from a direct marketing effort to a membership renewal.)
- You cannot copy segment/package combinations that already exist on the marketing effort you are copying to. You receive a message that allows you to copy all other segments or cancel.

# Changes to Navigation in Marketing and Communications

You now manage public media and direct marketing efforts in separate areas. Links appear for both features on the Marketing and Communications page.

We improved the data lists for marketing efforts, export definitions, and segments. In previous versions, when you opened these features from the Marketing and Communications page, you accessed a page similar to this one.

From this page, you clicked **View [record type]** to open the list of records.

Now, when you click the feature links for marketing efforts, export definitions, or segments, you immediately open a page with the list of records. These pages use the new list builder format that makes it easier to quickly view information about records in the list and to complete related tasks.

For example, from a marketing effort's page, when you expand a marketing effort in the list, a drop-down profile displays information such as the associated appeal, owner, and number of segments and packages. You can quickly monitor the progress of marketing effort setup tasks. The profile displays the **Setup started** date for the marketing effort and the current status and date for the segment counts calculation, file export, activation, and refresh processes. To view the status page for a process, click the date next to the process name. Icons represent the current status:

| | |
|---|---|
| | Process is running |
| ✔ | Process is complete |
| | Process is complete with exceptions |
| | Process did not complete |

Task buttons appear for processes you still need to run. For example, if the effort is activated, the **Edit activation criteria**, **Export effort**, and **Refresh effort** buttons appear.

You can also customize the list of marketing efforts. You can add and remove columns and choose how they filter and sort. For example, for the **Status** column, you can set the filters to display only activated marketing efforts. You can also save list parameters to quickly display different views of the list. For example, you may want activated marketing efforts to display fewer columns or in a different order. To save list parameters, click **Save list**. You can also search the list by keyword.

For more information about customizing lists, see Enhancements to Lists on page 43.

# Changes to Marketing Effort Records

We made enhancements to all types of marketing effort records to provide more information about the effort and its current status. This is an example of a marketing effort record in previous versions.

This is an example of the new marketing effort record.

The profile information at top is better organized and provides more details. The **Status** section displays the current state of the effort, the total number of segments and packages, and the total quantity of records in the marketing effort, broken out by segments and seeds. The **Status** field includes these states:

- Setup started – The effort is started but segment counts are not yet calculated.
- Counts generated – Segment counts were calculated.
- File exported – The effort was exported before activation.
- Activated – The effort was activated and the current date is before the effort's launch date.
- Past launch date – The effort was activated and the current date is later than the effort's launch date.

The **History** section displays the date setup started and the current status for the segment counts calculation, file export, activation, and refresh processes and whether those processes completed successfully. To view the status page for a process, click the date next to the process name.

Tabs on marketing effort records are unchanged with a few exceptions. Direct marketing efforts now respect the settings defined on communication templates. The tabs and options you can view and edit

depend on what is locked on the selected template. For more information about direct marketing efforts records, see Direct Marketing Efforts on page 1.

The Segments tab for direct marketing, membership renewal, or sponsorship efforts now includes a **Copy from another effort** button which allows you to copy segments from other efforts. For more information, seeCopy Segments From Another Marketing Effort on page 38.

All marketing effort records include two new tabs:

- The Effort Settings tab includes additional tabs that display information defined on the direct marketing communication template or on the acknowledgement, membership renewal, or sponsorship effort template. These tabs include the Source Code, Export, Activation, Address processing, KPIs, Finder Numbers, Budget/Expenses, Ask Ladder Overrides, and Seeds tabs.
- The Basic Information tab includes general information, such as the name, appeal, and channel, defined on the direct market communication template or on the acknowledgement, membership renewal, or sponsorship effort template.

## Enhancements to Marketing Business Processes

We made changes to marketing business processes to make it easier for multiple users to complete marketing tasks at the same time.

- The program now allows you to run multiple segmented house file import processes for marketing efforts at the same time.

  ***Note:*** The process fails if you attempt to run more than one segmented house file import for the same marketing effort at the same time.

- Because the refresh process for white mail segments refreshes all white mail segments in the database, the program now allows you to run only one white mail refresh at a time.

  ***Note:*** The refresh fails if you attempt to start the process while it is already running.

# Events

## Partially Pay for Events with Designations

You can allow registration fees for an event to apply to a designation. The amount that applies to a designation is equal to the receipt amount, which does not include the cost of any benefits from an event. Previously, for events with designations, registrants had to pay the event registration in full. To make things more consistent with other types of payments, we now allow for registrants to partially pay the registrations. If you partially pay for an event registration, the revenue is applied to the cost and benefits of the event until that portion is fully paid. Only after that happens is any event registration revenue applied to the designations.

# General Features

## File Uploads

In previous versions, when you attempted to upload a large file from your local machine, you received an error or the program timed out. To fix this issue, the program now breaks the file into small "chunks" (1 MB by default) and uploads each chunk separately to the web server. To change the chunk size, edit the "FileUploadChunkSize" application setting in your web.config file. For more information about how to edit the web.config file, see the *Infinity Installation and Upgrade Guide*.

The new file upload functionality also includes a progress bar with a **Cancel** button. These enhancements apply to all features that allow you to upload files from your local computer.

### Supported Browsers

- *Chrome* best supports the new upload functionality. It performs asynchronous uploads which means it can upload multiple chunks of the file at once. This is usually the fastest method, depending on server and network capabilities. Internal browser limitations restrict the number of simultaneous uploads the browser tries to do at once.
- *Firefox* or *Internet Explorer* version 10 or higher are the next best options. They perform synchronous uploads which means they can only upload one chunk at a time. This may result in slower upload times than *Chrome* can provide.

***Note:*** For Mac users, *Safari 6* fully supports the new upload functionality with asynchronous uploads. Earlier versions of *Safari* upload large files as one chunk so you may encounter errors.

### Unsupported Browsers

- *Internet Explorer* through version 9 does not support the new upload functionality. In older versions of *Internet Explorer*, the program uploads large files as one chunk so you may encounter errors. They do not provide the progress bar with a **Cancel** button.

## Enhancements to Lists

We added features to both data lists and to list builder lists. As a reminder, data lists are currently the most common type of list in the program, and they do not include advanced features such as column selection and filtering by column. We continue to convert data lists to the list builder format.

## Data Lists

For data lists that use the existing format, we have added the following features.

- You can now select to size all columns on a data list according to the width of the content in the columns. From the **More** menu, select **Autosize all columns**. This option automatically resizes all columns in the data list so all data displays completely.
- You can now right-click column headers to access menu options, including sort options for the column.
- When you scroll down a list, multi-row actions are now available at the top of the browser window. This allows you to use multi-row actions without having to scroll back to the beginning of the list.

# List Builder

***Show Me:*** Watch this video to learn more about list features.

Several data lists were upgraded to a new format that allows you to customize how data appears in a list. List options may vary based on the nature of the list.

You can add and remove columns and choose how they filter and sort. To change the order of the columns, click on a column header and drag it into a new position. For example, in *Batch Entry*, you can set filters on the **Owner** column so the list displays only batches you own. When you add columns, you may need to scroll across the list in order to view them.

You can also save list parameters to quickly display different views of the list. For example, you may want fewer columns displayed for constituent batches or in a different order. To save list parameters, click **Save list**. Additionally, you can use search to quickly locate items in the list. If you cannot find the information when you search or filter, your search and filter parameters might be too restrictive. However, you can clear the search and filters to expand the parameters.

You can also complete tasks for records in the list. To access task buttons, click the double arrows next to a record to expand the row. Expanded rows may also include additional information about the record.

# Exports to Excel

When you export a data list or query to *Microsoft Excel*, the date, currency, and numeric columns are now automatically exported with the correct data type. Previously, these columns were exported as text. If you wanted to sort or filter those columns, you had to first reformat them to the appropriate data type.

To export a data list to *Excel*, click **More** and select "Download to XLSX." To export query results to *Excel*, from the query, click **Export** and select "Download to XLSX."

# Rearrange Tabs

Individual users can now drag and drop tabs and subtabs into any order they prefer. This is a sticky setting, so it is saved the next time you access any record of the same type. This allows you to organize the tabs in the order that makes sense for your workflow. Any record that uses tabs, such as Constituents, Revenue, Events, and so on, can use this feature.

***Note:*** There is no way to reset the tabs to their default setting once they have been moved. They must be moved manually in order to reset them to the default.

# Customize Home Page

On the Home page, to accommodate the new Help Panel, we moved the **Customize** link. This new placement only appears when the Help Panel is selected as the help type.

Previously, the **Customize** link appeared in the top right corner of your browser.

Wit this release, the **Customize** link now appears next to **Home**.

For more information about the new Help Panel, see Online Help Panel on page 11.

For more information about configuring the Help type, see Configure Help Type on page 12.

## Navigation Tree

To accommodate the new Help Panel, navigation trees have moved. This new placement only appears when the Help Panel is selected as the help type.

Previously, navigation tree links appeared in the top right corner of your browser.

With this release, navigation tree links now appear next to the page name.

For more information about the new Help Panel, see Online Help Panel on page 11.

For more information about configuring the Help type, see Configure Help Type on page 12.

# General Ledger Setup

## Post Membership Installment Plans

You now have the ability to map membership installment plans to the ledger in order to generate ledger transactions. When you configure your membership programs, you can select whether to have the installment plans or just the installment payments be posted to the ledger. For annual, dues-based or dues- and contributions-based programs, the option appears on the Dues tab. For lifetime programs, the option appears on the Payment Options/Levels tab.

When you upgrade, existing membership programs that use installment plans are set to "Do not post." If you change this setting on the membership program, any memberships added after the upgrade that use installment plans will reflect the new post status. Existing memberships for those programs that have installment plans will be set to "Do not post."

***Note:*** In order to take advantage of this functionality when you upgrade, you will need to set up your General Ledger account mappings for membership installment plans and for membership installment plan payments. You have the option to map the contributed portion of memberships differently than the earned portion. You can also map revenue from add-ons associated with the membership. In addition, you can map write-offs for the membership installment plans. The membership installment plan accounts are mapped on the Membership Installments tab in **General ledger setup** in

*Administration*. The membership installment plan payments are mapped on the Payments tab in **General ledger setup**.

# Import

## Batch and Import Guide Enhancements

With this release, we made a significant investment in improving the quality of our existing User Education resources. One such area of improvement focused on the *Batch and Import Guide* and associated help file content.

The following list highlights several of our enhancements:

- We tested and updated content to ensure accuracy and provide a more logical flow of information.
- We created new How-To videos to visually enhance your understanding of *Batch* and *Import*.

  ***Show Me:*** Watch this video for a high-level overview of Batch

  ***Show Me:*** Watch this video for a high-level overview of Import

  ***Show Me:*** Watch this video to learn how to apply payments to commitments in Batch

- We added a new "Big Picture" chapter that offers an overview of *Batch* and *Import*, and describes how they work together to save time and promote consistent data management.

Batch and Import: The Big Picture

Full Circle View ..... 1
Life of a Batch ..... 2
Life of an Import Process ..... 5
Tips and Considerations ..... 7

  This chapter also illustrates the life cycle of a batch and import process, and provides tips and considerations to enhance your workflow.

- To help you more clearly understand the validation process, we added more detail to our list of validation errors and the reasons for their occurrence.

## Batch Validation

Batch validation helps your data remain consistent and error-free.

Validation occurs at different times during data entry. When you enter batches manually in **Batch entry**, the program flags simple errors as you enter data and more complex errors once you save the batch. To initiate validation at any point during data entry, click **Validate** on the toolbar of the data entry screen. When committing a batch, on the Commit parameters screen, you can also select **Validate batch before committing**.

The list below includes examples of validation errors and their solutions:

### Missing required fields

For missing required fields, ensure the field is populated. In other cases, you may need to deselect the field as required when customizing fields for the batch. For more information, see Customize the Fields in a Batch on page 70.

### Incorrectly formatted fields

When incorrectly formatted fields exist, a red X appears in your batch data entry row. A common formatting error is an incorrect email address.

### Duplicate constituents

Ensure duplicate constituents do not exist in your database. For more information, see Resolve Duplicate Constituents in a Batch on page 118.

### Account or account segment errors

Ensure the GL mapping is up-to-date or the segment is defined. For more information, see the *GL Setup Guide*.

# Memberships

## Search for Members

We have made enhancements to the Member Search and the Membership Dues Constituent Search screens.

To help save time with these searches, all checkboxes on the search forms, such as the ones to include inactive or deceased constituents, carry over to the next time you use the search screen. For example, you can search for a member with the last name "Smith" and choose to include individuals, but not organizations. The next time you perform a search, the last name criteria is removed but the individual checkbox remains selected. To access the Member Search screen, click **Member search** under **Tasks** on the *Memberships* page.

In addition, the Membership Dues Constituent Search screen also contains some advanced search criteria, such as the ability to search by alternate lookup IDs.

To access the Membership Dues Constituent Search screen, search for a constituent from the Add a membership screen or from a Membership Dues Batch.

## Membership Installment Plans

For membership programs which allow installment plans, you can add memberships and have the option to pay in full, pay the first installment, or create the installment plan without making a payment.

Previously, when you added a membership and selected **Create installment plan**, the "How are they paying" section was disabled.

***Note:*** Now in this section you can select a payment method of credit card or direct debit and enter the card number, but the transaction amount is still zero. This helps save you time when you have a card number but do not want to charge it yet.

# Post Membership Installment Plans

You now have the ability to map membership installment plans to the ledger in order to generate ledger transactions. When you configure your membership programs, you can select whether to have the installment plans or just the installment payments be posted to the ledger. For annual, dues-based or dues- and contributions-based programs, the option appears on the Dues tab. For lifetime programs, the option appears on the Payment Options/Levels tab.

When you upgrade, existing membership programs that use installment plans are set to "Do not post." If you change this setting on the membership program, any memberships added after the upgrade that use installment plans will reflect the new post status. Existing memberships for those programs that have installment plans will be set to "Do not post."

***Note:*** In order to take advantage of this functionality when you upgrade, you will need to set up your General Ledger account mappings for membership installment plans and for membership installment plan payments. You have the option to map the contributed portion of memberships differently than the earned portion. You can also map revenue from add-ons associated with the membership. In addition, you can map write-offs for the membership installment plans. The membership installment plan accounts are mapped on the Membership Installments tab in **General ledger setup** in *Administration*. The membership installment plan payments are mapped on the Payments tab in **General ledger setup**.

# Partially Pay for a Membership Installment

You now have the ability to partially pay for a membership installment. Previously, when adding a membership installment payment, you could pay the next installment amount and select a **Pay additional money toward next installment** checkbox to enter an additional amount. We have removed the checkbox and instead created a **Pay other amount** option and field. When you select **Pay other amount**, you enter the amount of the payment.

- If the amount is less than the next installment amount, the next installment is partially paid.
- If the amount is greater than the next installment, but less than the balance remaining for the installment plan, the amount is applied to the remaining installments, in order. If you want any additional amount to count as a donation instead of a payment toward the next installment amount, you can still use the "Are they also giving a donation" fields on the screen.
- If the amount is greater than the balance remaining for the installment plan, the installment plan is fully paid and the user is prompted for the remaining amount to become an additional donation.

When you upgrade, any Membership Dues Batch templates, as well as any uncommitted Membership Dues Batches,which include the **Pay additional money toward next installment** and **Additional amount** fields will be updated to include the new **Pay other amount** field. The **Pay additional money toward next installment** and **Additional amount** fields are not removed from the batches or templates because recurring memberships still use them. For applicable membership transactions in the batches when you upgrade, the **Pay other amount** field is automatically populated with the sum of the next installment amount plus the amount that was in the **Additional amount** field.

# Membership Gift Status

You can now make a membership a gift. To do this, on a membership record, click Other tasks, Make membership a gift. You can also do this from the Membership tab of a constituent record. After you make a membership a gift, you can edit the renewal information.

Previously, you could only remove gift status from the constituent membership record. No you can also remove it from the constituent record.

# Membership Dues Revenue Report

We added grand totals to the Membership Dues Revenue report and subtotals for each reporting group. These totals make it easier to quickly report on the total amount collected for membership programs and evaluate how well individual programs are selling.

| Reporting group | Membership level | Channel | Revenue | Add-on revenue | Memberships | Additional gifts |
|---|---|---|---|---|---|---|
| (no reporting group) | | | $3,558.00 | $30.00 | 41 | $502,048.00 |
| | Student | | $377.00 | $0.00 | 13 | $97.00 |
| | | (no channel) | $377.00 | $0.00 | | |
| | Individual | | $1,636.00 | $30.00 | 14 | $501,297.00 |
| | | (no channel) | $1,636.00 | $30.00 | | |
| | Family | | $1,545.00 | $0.00 | 14 | $654.00 |
| | | (no channel) | $1,545.00 | $0.00 | | |
| | | Grand totals: | $3,558.00 | $30.00 | 41 | $502,048.00 |

# Prospects

## Search External Prospecting Database Updates

From *Prospects*, when you search the Target Analytics prospecting database for new prospects or for more wealth information on existing constituents, we've made improvements to the search process and added three new data sources.

# Added Tiles to the Search Results Grid

As a researcher, you need to quickly search and consume new assets located during a prospect search, to identify new prospects and groups of prospects. The new tile structure we added to the results grid helps you in this effort.

The new tiles display details about the prospect's wealth. To make sure you're viewing all tiles for which information was located, click Show more.

Links included in the tiles take you to screens providing additional information.

For example, if you click on one of the company names included in the **Securities** tile, a Securities information tile appears with information about the prospect's stock with that organization.

In addition, if more than one record is located for a tile, right and left arrow keys display, enabling you to move to the next record located and easily return to the record you are leaving.

And lastly, if you want to customize the tiles that appear or what order they appear in, click the gear icon located next to the **Sort by** field to access the Customize prospect search results screen.

# Simplified the Add New Individual Screen

To help you quickly add new prospects from the search results grid, information located during the search process is now available on the Add new individual screen. For example, if a spouse or business is associated with the prospect in the search results, you can add them easily to the new record by selecting the spouse and/or business name from the drop down menu in either the Select spouse's name or Select a primary business field.

If this information is not included in the search results, but you know the spouse or primary business, click or enter manually. You can then either search your system for the relation or open the add screen and add the relation to your system.

Click the new Set Relationships tab to view reciprocating relationships entered for the prospect. You can edit these entries if necessary.

# Add New Prospect from Search Page

From *Prospects*, **Search external prospecting database**, if after you run a search of the Target Analytics prospecting database, you fail to locate the prospect you want, you can now easily add the new prospect from the Search page. On the Search page, click **Add a new prospect and screen now**. This defaults any search fields you entered, speeding up your data entry.

# Enhanced the Advanced Search

On the Search external prospecting database page, to help you search for prospects using the advanced search options, we've moved the advanced options to a single screen: the Advanced search screen.

In addition, after you run the search, fields other than those for name and address information, display at the top of search results grid, enabling you to keep track of the parameters you used for the search.

This makes it easy for you to adjust your parameters and refine your search if necessary, without having to open the Advanced search screen again.

To remove any advanced search options selected for the search, click the "X" in the parameter display at the top of the results grid. You can then update the search results minus the deleted parameter.

# New Advanced Search Filters

For the external prospecting database search, we added a number of new search filters, such as:

- Age range
- Household member last name
- Household member first name
- Business identified check box
- Confirmed wealth changed to 2 options: Min confirmed wealth and Max confirmed wealth
- Giving categories
- Total giving
- Largest gift
- Real estate value
- Securities value
- Household income estimate
- Discretionary spending estimate
- Household Mosaic

Some of the new filters are the result of the three new data sources we added this release.

# New Data Sources for Prospect Search

We added NOZA, Experian, and Thomson data sources to the external prospecting database search.

- **NOZA data source** – is the world's largest searchable database of philanthropic data. NOZA's data is comprised of detailed charitable donation information that has been collected from publicly-available Internet locations.

  NOZA data appears on the Giving tile.

- **Thomson data source** – is the leading provider of US Securities and Exchange Commission (SEC) insider information and business information relating to the top officers/directors, including compensation and earnings information. Data has been collected from mandatory filings of form 144 with the SEC and annual corporate reporting.

  Thomson data appears on the Securities tile.

- **Experian data source** – provides detailed consumer information from self-reported and credit sources to identify wealth indicators, such as household income and home value, as well as the number of children, discretionary spending estimate and vehicle value.

  Experian data appears on the HH Members and Demographic Models tiles.

When you use advanced search feature, you can also filter your search based on fields specific to the new data sources. For example, we added HH member first name and HH member last name, Household income est., Discretionary spending est., and Household mosaic fields to accommodate the Experian data source addition.

When you add a prospect to your database, you can access the new data source information from the prospect's Wealth and Ratings record.

- NOZA giving information can be found on the Giving tab.
- Thomson securities information can be found on the Assets tab.
- Experian Household member, income, and demographics information can be found on the Biographical Information tab.

If this information is not included in the search results, but you know the spouse or primary business, click or enter manually. You can then either search your system for the relation or open the add screen and add the relation to your system.

Click the new Set Relationships tab to view reciprocating relationships entered for the prospect. You can edit these entries if necessary.

# Research Lists

To help researchers manage prospects, we added Research Lists, which enable you to efficiently build lists based on simple criteria. You can also leverage a powerful tool set included with the lists. The tools enable you to screen, analyze, and prioritize your prospects.

Research Lists replace Research Groups, but the replacement comes with a number of enhancements that make the lists more workable.

***Note:*** The new Research List functionality includes the ability for you to categorize your lists. **Research List Category** is a code table in *Administration* in the Research List code table category. You can determine which categories are most meaningful for your organization and users.

# View Research Lists from the Prospects Page

We understand that as researchers you want to see useful research list information from the main Prospects area. When we added research lists, we added favorite and recently accessed sections to the top of the Prospects page. From here,you can quickly open any list included in the Favorite lists or Recently accessed lists box, add a new list, and view all lists.

# Research Lists Page

The main research lists page can be accessed by clicking **View all lists** from the Prospects page. This takes you to an unfiltered list of all your saved lists. Here you can manage your lists, delete old ones, and perform top level actions on individual lists.

- **Filters**: Selecting **Filters** provides you with three filtering options: Favorites, Accessed Lists, and lists you created.
- **Favorites**: To mark a list as a favorite, just click the star next to the name. The list will then display in your favorites list on the Prospects page.
- **Actions available**: On each list, if you select the drop down to the left of the name, you can access a number of actions.
    - Edit the list
    - Delete the list
    - Assign a prospect manager to all members of the list
    - Generate a map locating all members of the list
    - Generate a research list report
- **Columns**: Because the Research lists page includes enhanced list functionality, you can reorder (drag and drop to the preferred location) and add columns. You can also quickly search for your list or filter the lists based on a specific column.
- **Categories**: Categories were added to enable further segmentation of your lists. You assign your list to a category from the Add/Edit research list screen. You create categories in Administration.

# No More Tabs

When you open a research list, the new list page displays wealth summary information in the new summary section at the top of the page.

You no longer have to click to the Wealth Summary tab. From here, you can track your remaining screens, view your subscription level, and even request more screens.

Also, the Members tab is now a Members list with all related tasks living in the list. From here you can edit the list, map members locations, delete members, copy members to other lists, disable WealthPoint updates on member records, add new members to the list, and more.

We're saving you extra clicks so you can see everything at a glance and perform research tasks faster!

# Enhanced Research List Functionality

As a researcher, you need to see the members of the group and sort by various wealth, giving, affiliation, and biographical attributes so that you can effectively focus on the top prospects. To aid you in this effort, we added enhanced list functionality to Research Lists.

With the advanced list functionality, you can filter, reorder and search content included in a list. One of the best improvements with lists is that you can now display only columns you feel important for managing your list.

Research lists include a large set of Biographical, Wealth, Giving, and Ratings fields you can set as columns and filters. You can also include attributes as columns.

To make attributes available in your lists, from *Administration*, click **Attribute Categories**. Open the Attribute category you want available on your lists and click **Edit**. The Edit attribute category screen appears.

Select **Make available in lists** and click **Save**.

Each user that has rights to view a list can set the columns they want to view and those columns remain the same the next time they return to the list. When a new list is built, it returns with a default set of columns.

# Easy to Use Add Research List Screen

When you create a new research list, you can easily control who is included in your list, and you can do this without creating or editing a selection file in *Query*. You now have direct access to the most common fields used to build lists. The fields are arranged based on five categories: Biographical, Education, Giving, Ratings, and Wealth.

If your criteria needs are more complex, you can still use selections or use a combination of both to create the list.

To add more than one criteria from a category, add each one at a time. You can remove criteria as well.

Other updates to the add new research list include:

- **Categories**: You can now set categories when you build your list. This enables easier list management .
- **Populate process is gone**: You no longer have to run a populate process step when you want to refresh your list. Now, you can set a refresh option when you add the list. If the refresh option is included when the list is created, you can simply click a button on the Research lists page to refresh your lists. You can also choose to have the lists update automatically nightly.
- **Editing lists**: You can easily change the criteria used to build your list by selecting the Edit option under the list. When you then rebuild the list with your changes, the program asks if you want to just add new people to the existing list or rebuild the list entirely.
- **Sites**: Research lists respect site security the way research groups did. No loss of functionality in the update.

## More Flexibility with Research Lists

You can now select and act on multiple records at a time in a research list:

- Screen a selected set of records, instead of the entire list or one record at a time. This enables you to keep your list intact but work on specific prospects inside the list. You can perform these actions on up to 100 records at a time.
- Assign multiple prospects to a fundraiser.
- Copy specific prospects to a new group. After using the list functionality to filter and manipulate the list down to a set of records you feel comfortable with, you can select and copy those prospects to their own list or to an existing list. This is especially helpful if you want to build a list for someone else to work on or want to ensure your top prospects are separated for special attention.

For a specific prospect member in the list, you can:

- Edit their research details, such as research status, prospect manager, and research summary.
- Copy them to a different list.
- Assign a prospect manager.
- Disable WealthPoint updates.
- Remove them from the list.

## Access a Prospect's Wealth Summary from a Research List

Prospect researchers and fundraisers working in a list can now easily access summary wealth information on a list member without having to leave the research list.

From a research list, include the **Total confirmed assets** and **Total identified assets** columns. Then, in the Members list, click the link in either the **Total confirmed assets** or **Total identified assets** column. The member's Wealth summary screen displays.

If you click any assets or indicator links on this screen, you navigate to the prospect's wealth and ratings record, to view more information about the wealth detail. You can always navigate back to the list by clicking on the list name on the Wealth Summary tab, under the **Research Details** section.

The "New" icon identifies assets and indicators that have been updated since the last time this record was viewed.

# View Research Summary and Research List Association from Wealth Summary Tab

To enable researchers to easily identify research list membership and navigate to the lists, this information now displays on the Wealth Summary tab of the prospect's Wealth and Ratings record. It is included in the **Research details** section.

The order in which the lists display is based on:

a. Most recently accessed by current user

b. Most recently added to a research list (used if current user has not accessed)

Up to 10 groups can display on the prospect's Wealth and Ratings record.

Also in the Research details section, you can edit the research information for a prospect including a summary, research status, and assign or edit a prospect manager.

# Sort Research Lists by Last Name

In Research Lists, you can now sort members of the list by last name. Your default column and sort options have not changed. From a research list, click Columns. In the column options, you can now select Name (Last, First Middle).

You can add this sort option to existing research lists. Open the research list you want to update, then edit the columns displayed in the data list.

## Attribute Options Added to Research List Columns

To help you maximize the usability of your research list view, you can now select model scores and custom attributes as column options in your list. For example, if you create a "General Fund" Model Scores attribute, and you want this attribute displayed in a research list grid, from the list grid, select the Columns drop-down menu and select the new "General Fund" attribute. Click Apply, and the "General Fund" column is added to the grid.

***Note:*** When creating the attribute in Administration, make sure to select Make available in lists on the Add an attribute category screen.

# Experian Data Source Added

To help prospect researchers build a prospect profile by easily finding a prospect's age, household members, personal, and demographic information, we've incorporated the Experian data source in our WealthPoint screens.

For Professional level subscribers, this means that a WealthPoint screen run from the prospect's Wealth and Ratings page or from a research list will return any located household income, discretionary spending, and mosaic information, in addition to the standard name, birth date, marital status, and occupation information that is available for all subscription levels. It also adds the first located household member.

All other subscribers receive the standard name, birth date, marital status, occupation, and household member information.

For example, if you open a prospect's Wealth and Ratings record and click on the Biographical Information tab, and you notice your prospect's Personal information at the top of the tab does not include birth date or marital status information, you can run a wealth screen on the record to see if the Experian data source can locate the missing information.

## Additional Household Information from Experian

To help you better identify prospects correctly as well as better understand households and relationships, we return additional household member information from Experian. You can view up to five household members.

Because we provide additional household members, the first person listed as an additional household member may not be the spouse.

In the search, you can scroll through additional household members, if present.

When you screen the prospect from the Prospecting Database results, on the Add new individual screen, we recommend you select the spouse from the list of additional household members returned. When you select the spouse to include on the wealth and ratings record, you improve the results you receive when you perform a wealth screen.

On the prospect record, from the Biographical Information tab, under Biographical Data, upon your next wealth search the data row is added with the Experian information. If the data includes additional household members, they are added to the prospect record.

When you add new prospect records from the Target Analytics search, the Experian data row is added with up to five household members automatically included.

You can review and edit the household members information on the Experian record.

***Note:*** The additional household information from Experian includes a **Household Income Estimate**. This is a code table in *Administration* in the Prospect Research code table category. The values for this code table are pre-populated with the values Experian uses to categorize household income estimates.

# Management Tools Added for Experian Data

You can now edit, reject, confirm, and delete Experian data included on a prospect's Wealth and Ratings record. To access these tools, select the Biographical Information tab, under the Biographical data section, expand the Experian record.

From an Experian record, you can also click the link for the **Household Mosaic** field. This opens a new window to the Experian Mosaic USA Interactive Guide. The guide provides a description of what people in this demographic range are like. Your constituent may not have all these characteristics but it can help you build a profile and understand better what motivates and what are the traits of constituents in this mosaic group.

# New Record State Column for Real Estate Assets

***Note:*** This change was released in ***Blackbaud CRM*** 3.0 patch 61.

Due to individual counties changing APN numbers, we've added a **Record state** column to help you prevent duplicate real estate records inflating your prospect's real estate asset total. Real estate records can have a status of "historical," "current," or "new."

APN (assessor parcel number) is a unique identifier for real estate. However, APNs can change and without a consistent pattern because individual counties determine how to format their APN. For example, an APN county identifier changed from 01261801440000 to 123119. The issue does not affect new prospect wealth screenings, only when you re-screen an existing prospect who lives in a county whose APN has changed. We want to give you the opportunity to track historical and current properties to accurately determine the potential of your prospect as a major giver to your organization. We do not want to take data away from you to prevent these duplicates from occurring when APNs change.

With the update to 4.0, we can help you prevent these errors going forward. However, if you have re-screened prospects prior to this release in a county that has undergone an APN change, you may have duplicates you want to clean up in your database. We have several solutions to help you prevent and clean up duplicates in your database.

- When you research an individual prospect, on the wealth and ratings record, Assets tab, you can manually delete or reject the duplicate property if you notice two properties with the same address but different APNs. If you do not want to delete the duplicate, you can mark the property with the old APN as historical.

- You can create a constituent query and include the name and lookup ID for the fields to display and filter by real estate date added since you last re-screened prospects.

If you have not re-screened people for a long period of time leading up to the 4.0 update, you only need to query on the dates since you re-screened. For example, if you annually re-screen people during August, your query only needs to search for real estate added since 08/01/2014.

- If you have not re-screened recently, wait until your database updates to 4.0 before you re-screen prospects for new wealth information. The new record state column will use the following logic to prevent duplicates:
  - **New** – When you wealth screen, if a property doesn't match an existing record in your database but exists in CoreLogic, the property asset is marked as "New." Once a user views this record, the status updates to "Current."
  - **Historical** – When you wealth screen, if a property was in your database before the screen but doesn't match any records in CoreLogic, the property asset is marked as "Historical."
  - **Current** – When you wealth screen, if an existing property in your database matches a record in CoreLogic, the property asset is marked as "Current."
- If you have a large number of duplicates and would prefer to delete existing real estate records instead, contact Customer Support. They can assist you with a process to delete existing CoreLogic real estate records before you perform your wealth screens.

***Note:*** When you re-screen a prospect, if you have manually changed the record state for a property, we will not update the property status when the record is refreshed after wealth screening completes. We will update the real estate data but not the property record state for assets that you specifically updated.

To assist with the accuracy of real estate values, we also updated the capacity formulas . By default, **Include historical records** is not selected as part of the real estate calculation settings. You can select the option to include if it is important to one of your capacity formulas.

While capacity formulas can include historical records, prospect research reports, real estate identified fields, real estate confirmed fields, and real estate summaries do not include historical properties.

# General Prospects Enhancements

Also in this release, we've provided some general updates to improve your experience with prospects and major giving constituent work.

## Track Solicitors on Opportunities

Currently, fundraisers on a major giving plan are credited for all revenue raised for all opportunities on the plan. With this release, you now have the ability to credit individual fundraisers for their associated opportunities only. This provides the ability for you to track the revenue that fundraisers generate in greater detail.

To assign solicitors to an opportunity, open a major giving prospect and select a major giving plan. From the plan record, go to the Opportunities tab and select an opportunity. On the Opportunity page, go to the new Solicitors tab and click **Edit**.

From the Edit solicitors on opportunity screen that appears, the default option is set to **All plan solicitors**. To select individual solicitors to associate with the opportunity, choose **Selected plan solicitors**. Once selected, all active plan solicitors appear on the screen.

After you add solicitors to an opportunity, you can view them on the Solicitors tab on the Opportunity page, as well as in the Opportunity details view on the Opportunities tab of the major giving plan page. The solicitors and their opportunity totals display on the Fundraiser and Major Giving Management pages.

Solicitors associated with an opportunity that is linked to revenue are also associated with the revenue. To view this information, from the revenue record, click the Details tab. Solicitors are listed under **Application details**.

# Delete Constituents with WealthPoint History

You can now delete a constituent that has a WealthPoint search history or a Research Request history.

# Additional Prospect Research Tracking Information Added to Query

When you complete a prospect research request for an individual, if your organization tracks the total number of research hours, you can now filter and track those hours in *Query*.

From a prospect research request query, under the **Prospect Research Request Constituent** node, you can filter and display results with the new **Total research hours** field. Under the **Prospect Research Request Constituent** node, we also added a new **Source** node, with additional fields to filter and display results about the completed individual research request.

# Query and Export

## Information Library

***Show Me:*** Watch this video to learn more about the information library.

Queries and KPIs now appear in the new information library. To access the library, from *Analysis*, click **Information library**. The library opens directly to the Queries tab. To access KPIs, click the KPIs tab.

The functionality of queries and KPIs is unchanged, but the library offers features to better organize and navigate your queries and KPIs.

- **View Options:** The new left-side pane allows you to view queries by folder, category, owner, or record type, and to view KPIs by folder, type, or record type. Select an option from the **View by** field, and the results display below.
- **List Updates:** The list of queries or KPIs is easier to navigate. Use the **Search** field to quickly search for a query or KPI, use filters on each column, and select the columns to see. To view different columns, click **Columns** and select the ones you want to display, including new columns such as **Last run by**, **Last run duration**, **Last run on**, and **Last run result count**.
- **Folders:** To organize your queries or KPIs by folders, click **Manage folders**. The Manage Folders screen works the same as it did before this update. To add queries or KPIs to a folder, first select "Folder" in the **View by** field. Then select the checkbox next to the query or KPI you want to move and click **Move**. Select a folder and click **Save**. You can move multiple queries or KPIs at one time.
- **Favorites:** To mark queries and KPIs as favorites, click the star next to the query or KPI name.
- **Categories:** To add queries to a category, first select "Category" in the **View by** field. Then select the checkbox next to the query you want to move and click **Move**. Select a category and click **Save**. You can move multiple queries at one time.

# Export Limit in Query

The 500 row export limit for queries no longer exists. Now, when you export a query, you view all rows. This allows you to create a quick export directly from a query that includes all query results.

Because there is no longer a row limit, we have removed the **Create export** button for smart queries. To download results from a smart query, click the *Excel* icon and select whether you want to download the results as an .xlsx or .csv file. This option downloads all results.

***Note:*** Certain web.config settings can limit the number of rows exported from queries. These settings default to 100,000 rows. If you need your exports in *Excel* to include more than 100,000 rows, you can change the web.config settings for WebShellAdHocQueryExportMaxRows for ad-hoc queries and the settings for WebShellSmartQueryExportMaxRows for smart queries.

To access queries, from *Analysis* click **Information library**.

# Code Table Field Values

When you make a change to a code table entry, queries that use that criteria value now identify the new value as the equivalent for the old value. Previously when you changed a code table entry, queries using that value did not recognize the new value as a match. Therefore, query results displayed differently than before the code table change.

For example, if you previously changed a constituency from "Affiliated organization" to "Affiliate" in the **Constituency code** table, a query that used this criteria did not include constituents with the new "Affiliate" code because the program did not recognize the two values as the same. Now when you edit a code table entry, the program assumes the old and new values represent the same data so

queries update to reflect this. In this example, both existing constituents with a constituency of "Affiliated organization" and new constituents with a constituency of “Affiliate” appear in the results.

***Note:*** To make sure this functionality works as intended, only rename entries that serve the same purpose. You should always create new code tables for a new purpose and you can mark old values you no longer need as inactive.

To make sure code table field values update for existing selections, open the query used by a selection and save it again.

To access your queries, from *Analysis*, click **Information library**.

# View Query Results on Save

When you save a query, the program now navigates you directly to the query results. Previously, you navigated to the query list.

# View Exports Associated with a Query or Selection

You can now see exports associated with a query directly from the query or from selections based on a query. This feature includes a number of improvements make it easier to navigate export information.

- You can now view exports associated with a query directly from *Information library*. From *Analysis*, click **Information Library**. On the Query tab, expand the query you want to see exports for and click **View exports**. You can also click **View exports** under **Tasks** for any query record.

- From the Selections page, you can now view the exports associated with each selection. From *Analysis*, click **View selections**. On the Selections page, expand a selection and click **View exports** to view all exports associated with that selection. You can also click **View exports** under **Tasks** for any selection record.

# Create Export from a Selection

You can also create an export directly from a selection. Previously, you had to do this from the Export page. From *Analysis*, click **View selections**. On the Selections page, expand a selection and click **Create export** to create an export of the selection.

# Manage Exports

The Exports page now includes filtering functionality. To access this page, from *Administration*, click **Export**. To filter exports by a column, select it and use the **Columns** button to add or remove it from your view. This allows you to easily find existing exports so you do not risk creating a new export when one exists that fits your needs.

The default **Query / Selection** column displays the query or selection the export is based on. To navigate directly to it, click the name of the query or selection. Use this link to confirm that your export includes the information you want.

# Query Source Views for Business Processes

In previous versions, you could use the Business Process query view to view business process properties, such as the name, description, and whether the process generates output. Now you can also select a Business Process Parameter Set or Business Process Status as the source view for an ad-hoc query. Querying on business processes can help you identify processes and records you may not know exist in your system.

The Business Process Parameter Set query view provides information about business process parameters, such as the name of the parameter set and who created it.

The Business Process Status query view provides information about business process statuses, such as the current status (Running, Completed, Completed With Exceptions, or Did Not Finish), when the process was run, who ran it, and the number of records processed.

# Make Queries or KPIs Favorites from the Query or KPI Record

You can now mark a query or KPI as a favorite from the query or KPI record. From the *Information library*, click a query or KPI name to access the record. To mark the query or KPI as a favorite, under **Tasks**, click **Add to favorites**.

You can also mark a query or KPI as a favorite from the library by clicking the star next to the query or KPI name.

# Save As Option for Query

A new **Save as** option is available when you create and edit queries on the Ad-hoc Query screen in *Analysis*. This allows you to change existing queries and save them as new queries. Previously, you copied queries to create new versions of them. This enhancement reduces the number of steps to update existing queries so you can work more efficiently.

***Note:*** The new queries include all the permissions and other properties from the original queries.

# Constituent Query from the Data Warehouse

***Show Me:*** Watch a video about queries from the Blackbaud Data Warehouse.

You can now create a constituent query from the Blackbaud Data Warehouse. When you create an ad-hoc query, you can use the new Constituent (from the Blackbaud Data Warehouse) source view.

This query source view is similar to the existing constituent query. In addition to the options available in the existing constituent query, this source view includes primary email and phone number fields under Constituent. This allows you to include primary contact information for your query results without excluding constituents who do not have a primary email or phone.

This query source view does not include all the options available in the existing constituent query. This new source view is designed to provide only the most commonly used fields to simplify the experience of creating a constituent query.

## Rolling Date Filter Option

When you use the Constituents (from the Blackbaud Data Warehouse) source view to create an ad-hoc query, a new rolling date option is available for date field filter criteria. A rolling date is a date range, relative to the current date, that either occurred in the past or will occur in the future. For example, you can now create a query to search for constituent records that were added three days ago, or memberships that will expire three months from today.

You can specify rolling date ranges in day, week, month, quarter, year, and fiscal years when you use the following date criteria operators:

- Is
- Is not
- Before
- After
- On or before
- On or after
- Between
- Not between

***Note:*** To use fiscal year ranges, you must configure fiscal years in *Administration*.

Previously, you could only use pre-defined date filters such as yesterday, last week, tomorrow, or next week. This enhancement eliminates the need for you to manually change queries when the range is the only filter to update.

***Note:*** The "Rolling date" option is also available when you create custom query views from the data warehouse with ***Blackbaud CRM*** SDK. For information about how to include it in customizations, see the Infinity SDK online help.

For detailed information about each combination of rolling date options you can select, refer to Date Filters for Date Fields in the *Query and Export Guide*.

# Open Data Protocol

You can now use Open Data Protocol (OData) to consume, share, and manipulate data you query from the program.

***Show Me:*** Watch the walkthrough and related videos to learn more about OData features.

OData is a data access protocol designed to provide standard access. This format can then be consumed by other programs, allowing you to further segment, manipulate, and create visual representations of the data.

When you create a query in ***Blackbaud CRM***, you can now access the data from that query in OData format. On the Information Library page, expand the query you want to use and click **Get OData Link**. Then, you can use *Microsoft Excel 2010*, *Microsoft Excel 2013*, or *Tableau* to consume that data.

You can share dashboards and charts created with OData with any user, regardless of their Blackbaud permissions. However, because users must enter their Blackbaud credentials when they consume the data, any data refreshes respect the user's security permissions.

# Set Up OData Connection

Before you can use OData, you must set your application root URL. From *Administration*, click **Set application root URL** under **Configuration**.

The root URL must be in this format: https://[Server name]/[Virtual directory name]. You can see your root URL on your browser address bar when you are logged into your database. The portion of your URL before /webui portion of the address is your root URL.

# OData in Microsoft Excel 2010

In *Microsoft Excel 2010*, you can generate pivot tables using the OData information.

***Note:*** If you do not already have it, you must first instal the power pivot add-in to *Excel*. From the Microsoft Office Downloads page, download the add-in and install it. Most users have the 32-bit version of *Excel*, so we recommend that you download the x86 version of the add-in, unless you know that you are using a different version. If you are not sure, to see your version in *Excel*, click **File**, **Help**.

1. From the PowerPivot ribbon, click **PowerPivot Window**.
2. On the PowerPivot screen, click **From Data Feeds** under Get External Data.
3. In the **Friendly connection name** field, enter a descriptive name for your data feed, such as

"Blackbaud CRM."

4. In the **Data feed URL** field, paste the URL you got from your query in ***Blackbaud CRM***.
5. Click **Advanced**. On this screen, enter your Blackbaud CRM user name and password and click **OK**.
6. Click **Next**, and select ODataQuery.ashx as the source table.
7. Click **Finish.**
8. Once the import is complete, click **Close**. You can now manipulate and explore your data in the power pivot.

***Note: Blackbaud CRM*** does not support *Microsoft Power Query for Excel* with OData feeds.

# OData in Microsoft Excel 2013

In *Microsoft Excel 2013*, you can create power views using the OData information.

***Note:*** If this is your first time using OData in *Excel*, click **Options** and make sure you have the Power View add-in. Select "COM Add-ins." Then, select **Power View** and **Microsoft Office PowerPivot for Excel 2013** and click **OK**.

1. From the Data tab, select **From Other Sources/From OData Data Feed**.
2. Paste the URL you got from your query in ***Blackbaud CRM*** and enter your credentials.
3. Click **Next**.
4. Check the "ODataQuery.ashx" checkbox.
5. Click **Next**.
6. You can enter a description and change the name if you prefer.
7. Click **Finish**, and then click **OK** to import the data.
8. On the Import Data screen, select "Power View" and click **OK**. You can now use *Excel* to create charts and dashboards of your data.

***Note: Blackbaud CRM*** does not support *Microsoft Power Query for Excel* with OData feeds.

# OData in Tableau

In *Tableau*, you can create dashboard using the OData information.

1. From *Data*, click **Connect to Data**.
2. Select "OData."
3. In the **Select or enter a URL** field, paste the URL from your query.
4. On Step 2, select **Use a Username or Password** and enter your ***Blackbaud CRM*** credentials.
5. On Step 3, click **Connect**.

6. On Step 4, enter a name for the feed.
7. Click **OK**.

# Date Criteria Operators

In *Analysis*, the criteria operators for date field filters now include updated labels. The new terminology is easier to associate with date information than the labels that appear for other types of fields. For example, the previous "Less than" operator is now called "Before" for date fields. This enhancement reduces confusion when you select date field criteria so you can work more efficiently.

The filters are available when you create ad-hoc queries, and when you use ad-hoc queries to create user-defined data lists and smart query definitions.

After you select an operator for a date field in a user-defined smart query definition or data list, the updated label appears when you create smart query instances from the definition or include the data list on pages.

To update existing user-defined data lists and smart query definitions, edit and save them from the Shell Design section in ***Administration***, ***Application***.

Also, list builder column filters throughout the program and existing queries automatically include the new labels.

The new labels also appear on list builder column filters throughout the program.

The table below compares the previous operator labels to the new labels. For a complete list of date field criteria operators, refer to Criteria Operators for Date Fields in the *Query & Export Guide*.

| Previous Operator Label | New Operator Label |
|---|---|
| Equal to | Is |
| Not equal to | Is not |
| Less than | Before |
| Less than or equal to | On or before |
| Greater than | After |
| Greater than or equal to | On or after |

# New Active Users Query Source View

The new **Active Users** source view allows you to see user activity in the system. For example, you can create an active user query to see logins to the system to see which users were actively using the system on a given date, or see if there have been any logins after a specific date.

The **Active Users** source view tracks requests sent through the ***Blackbaud CRM*** API. These requests usually originate from the program itself, but results for queries of this type also reflect requests from associated utilities or other sources.

***Note:*** Logouts are not database requests. For this query source view, a logout is defined as fifteen continuous minutes of an application user not initiating any requests.

In order to avoid performance degradation when tracking this information, the program does not track user activity for the purposes of this type of query when the performance burden on the system reaches certain thresholds. These thresholds are controlled by settings in the Health Monitoring section of the web.config file for your database.

# Revenue

## Pledge Installments

***Show Me:*** Watch this video to learn more about the new pledge installment enhancements.

On the Add and Edit pledge screens we added the **Installment amount** field. In this field you enter the amount of the pledge installment. When you enter the installment amount, the number of installments is calculated for you automatically. Keep in mind, if you select a frequency of Irregular or Single installment, you cannot enter an installment amount for the pledge.

***Note:*** The **Installment amount** field is also now on the Edit Posted Pledge screen.

With this release we also made it much easier to add and edit pledge installments. Instead of going to multiple locations in the program to edit installment information, you can now save time by doing so from one centralized location—by clicking **Edit installment designations** on the Add or Edit pledge screens. This button also appears on the Reschedule remaining installments screen. From the Edit installment designations screen, you can change the schedule and installment amounts for each designation.

| | No. | Amount | Total Designated | Not Designated | Athletics | BUILDING | LAB |
|---|---|---|---|---|---|---|---|
| Pledged | | $100,000.00 | $100,000.00 | $0.00 | $25,000.00 | $50,000.00 | $25,000.00 |
| In installments | | $100,000.00 | $100,000.00 | | $25,000.00 | $50,000.00 | $25,000.00 |
| Difference | | $0.00 | $0.00 | | $0.00 | $0.00 | $0.00 |
| | | | | | $0.00 | $0.00 | $0.00 |
| *Total applied* | | *$35,000.00* | | | *$8,750.00* | *$17,500.00* | *$8,750.00* |
| 11/22/2013 | 1 | $15,000.00 | $15,000.00 | $0.00 | $3,750.00 | $7,500.00 | $3,750.00 |
| *Applied* | *1* | *$15,000.00* | | | *$3,750.00* | *$7,500.00* | *$3,750.00* |
| 11/22/2014 | 2 | $15,000.00 | $15,000.00 | $0.00 | $3,750.00 | $7,500.00 | $3,750.00 |
| *Applied* | *2* | *$15,000.00* | | | *$3,750.00* | *$7,500.00* | *$3,750.00* |
| 11/22/2015 | 3 | $15,000.00 | $15,000.00 | $0.00 | $3,750.00 | $7,500.00 | $3,750.00 |
| *Applied* | *3* | *$5,000.00* | | | *$1,250.00* | *$2,500.00* | *$1,250.00* |
| 11/22/2016 | 4 | $15,000.00 | $15,000.00 | $0.00 | $3,750.00 | $7,500.00 | $3,750.00 |
| 11/22/2017 | 5 | $15,000.00 | $15,000.00 | $0.00 | $3,750.00 | $7,500.00 | $3,750.00 |
| 11/22/2018 | 6 | $15,000.00 | $15,000.00 | $0.00 | $3,750.00 | $7,500.00 | $3,750.00 |
| 11/22/2019 | 7 | $10,000.00 | $10,000.00 | $0.00 | $2,500.00 | $5,000.00 | $2,500.00 |

On the Edit installment designations screen, the grid displays the designations for the commitment and the total amount applied to each designation. Amounts which are displayed in red or in parentheses indicate imbalances in the grid installment totals. The summary section at the top of the screen shows the amount and frequency of the pledge, in addition to the date and amount of the next installment.

At the top of the grid, the **Pledged** row shows the total pledge amount, as well as the amount designated and not designated. It also shows the amount for each designation. The **In installments** and **Difference** rows highlight if there are differences between the amount pledged and the amount designated. The rows at the top of the grid are not editable.

Below that, the installment schedule is listed with amount and designation information. You cannot change the number of installments or the installment dates, but you can change the amounts for each designation. This is helpful when you want to pay off the balance of one designation first. It is also helpful if a constituent needs to skip an installment but will make up the difference with the next installment payment. In this scenario, you can change the installment amount to zero and then add the amount to the next installment.

# Giving List Report

***Note:*** Before you run this report, a system administrator must install and configure the data warehouse. The data warehouse places records from your source database in a data warehouse so you can conduct complex reporting and analysis faster and more efficiently. For information about data warehouse, refer to the *Data Warehouse and OLAP Guide*.

The Giving List is a flexible tool that allows you to view revenue and other related information in many different ways to best suit your needs.

- As a major gift officer, I want to view gifts over a certain amount from this week.
- As a campaign manager, I want to find out how much money has been raised for one or more

specific campaigns (or appeals or funds) to gauge whether we are on track to meet our goals.

- My organization wants to treat commitments and payments slightly differently. For example, we want to view pledges but not pledge payments, but when it comes to event revenue, we want to view only the event registration payments and not event registrations that have yet to be paid.
- I want to view the gifts and total gift amounts brought in by each prospect manager or solicitor.

At the top of the Giving List report, a Summary section displays. You can click **Summary information** to select the information to include, such as the top performers by campaign, month, or city. Top performers can be listed by amount raised or amount received.

- **Amount raised** includes outstanding commitments even if there is no payment, such as a pledge with no pledge payments. The single, next installment of a recurring gift is included in the amount raised.
- **Amount received** includes only revenue payments received and not outstanding commitments. Only recurring gift payments, and not the next installment amounts, are included in the amount received.

***Note:*** The number of unique donors, first time donors, and repeat donors includes only actual revenue and not recognition credit.

Also in the Summary section, you can click **Amount raised** and **Amount received** to configure each option to include different types of commitments and payments. Only the transaction types selected will be included in the calculations for amount raised and received, and only those transaction types will be included in the Summary section of the Giving List report. The **Amount raised** and **Amount received** calculations are usually set for your organization by your system administrator. You can still click **Amount raised** and **Amount received** to view which commitments and payments are included.

***Warning:*** With the **Amount raised** and **Amount received** filters in the Summary section of the report, you select the types of commitments and payments to include in the calculations. Therefore, it is possible to select commitments (such as pledges) and payments toward the commitments (such as pledge payments) for the calculation. This essentially counts the same revenue twice. To avoid double counting the revenue, we strongly recommend you include either the commitments or the payments for the commitments, but not both.

Below the Summary section is the actual Giving List. This list includes all transactions according to the filters set on the list itself, not the settings selected in the Summary section. For example, you can filter the Giving List by constituent or date to get different views. You can add columns to have more filtering options, such as by prospect manager or inbound channel. You can also save your filter sets to reuse later. When you build your filter sets, you can click **Clear all filters** to reset the Giving List.

For more information about the list features, refer to the *General Features Guide*.

***Note:*** The Giving List can be exported to *Excel*, but it only includes the grid information. The summary information does not export.

***Show Me:*** Watch this video for a high-level overview of the Giving List

# Anonymous Recognition Options

With this release, you can now specify default recognition options for anonymous payments.

Previously (by default), the program did not save recognition credits on anonymous transactions. To add or edit recognition credits for anonymous transactions, you selected a revenue record and manually made changes.

To specify the new default option, from *Revenue*, click **Recognition settings** under **Configuration**. The Recognition Settings page appears. To edit the default option for anonymous payments, click **Edit** next to **Anonymous recognition options**.

From the Edit anonymous recognition options screen that appears, you can select to never apply or always apply recognition credits for anonymous payments. When you select **Payment is anonymous** on the Add or Edit a payment screen, or through an Enhanced Revenue Batch or Revenue Update Batch, the program uses the option you set here on the Recognition Settings page to handle recognition credits.

# Sustained Giving

With this release, we made significant enhancements to help you effectively manage and strategically grow your sustained or recurring giving programs using ***Blackbaud CRM***.

***Show Me:*** Watch the walkthrough and related videos to learn more about the enhancements

Enhancements related to recurring gifts include:

- A redesigned gift record that offers an at-a-glance view of the recurring gift status, installment amount, and frequency. We also refreshed the way you edit recurring gift statuses and streamlined status names and reason codes.
- A comprehensive activity timeline that captures installments, amendments, and other activity associated with the recurring gift.
- Reorganized transaction summary and detail information to improve the user experience around recurring gift activity.
- The ability to skip installments.
- Write-off improvements.
- Updates to payment methods on the Add and Edit recurring gifts screen and throughout *Sponsorship* and *Batch*.
- The new **Update recurring gift statuses** business process. Using this process, you can define rules to update multiple recurring gift statuses in the same business process.

## Recurring Gift Record Redesign

We redesigned the recurring gift record to include updated status and transaction summary information as well as a comprehensive activity timeline for installments, amendments, and other activity associated with the recurring gift. We also added the ability to skip installments and modified the installment write-off feature.

### Recurring Gift Transaction Summary Section

To improve the usability of the **Transaction summary** section for a recurring gift, we made the following changes:

- You can now view and edit designations directly from the **Transaction summary** section. From the action bar on the **Designations** grid, click **Edit designations**.
- You can now view payment details, and edit the payment method and associated fields. Next to a payment method, click **Edit**.
- We added the **Other recurring gifts** grid to display additional recurring gifts owned by the same constituent. From this grid, to view a recurring gift record, double-click the gift.

- We removed the **Status** section which previously displayed the **Frequency**, **Next transaction**, and **Acknowledgement** fields. We replaced this section with a new badge that includes the installment amount, frequency, and recurring gift status. To edit the status, click **Edit status** under the new icon (note that the **Edit status** link under **Tasks** on the explorer bar still remains).

- The following fields moved from the **Transaction summary** section to the Details tab: **Batch number**, **Revenue ID**, and **Acknowledgements**.
- We removed the **Summary** section which previously displayed the **Total paid**, **Status**, and **Past due** fields.

## Recurring Gift Activity Tab

To improve the usability of the Activity tab for a recurring gift, we made the following changes:

- The Activity tab now displays as the first tab for a recurring gift and represents a comprehensive timeline of all events associated with a recurring gift. From this tab, you can view a history of payment activity associated with a transaction, manage amendments, skip installments, and write-off installments for the recurring gift.
- Under **Activity**, installments and amendments associated with the recurring gift appear and are sorted by the most recent event. Installments represent expected or completed payments

spaced at a designated frequency. Amendments represent any manual or global process change to the properties of a recurring gift. For example, when you edit the payment method of a recurring gift or change the recurring gift's status, these actions are recorded as amendments on the timeline.

- Credit card and direct debit processing for recurring gift payments are also listed on the timeline.

## Recurring Gift Details Tab

To improve the usability of the Details tab for a recurring gift, we made the following changes:

- We moved the following fields from the Details tab to the **Transaction summary** section: **Start date** (renamed to **Date started**) and **End date**.
- We moved the ability to view and edit designations and payment method information to the **Transaction summary** section.
- The Details tab now displays after the Activity tab for a recurring gift.
- The Details tab now displays the following fields: **Batch number**, **Revenue ID**, **Acknowledgements**, and **Acknowledgement date**.
- For membership recurring gifts, the Details tab now displays a link to the membership commitment, as well as the **Earned income amount** and **Contributed income amount** fields.
- For sponsorship recurring gifts, the Details tab now display a link to the sponsorship commitment.

***Tip:*** Fields related to SEPA, such as **Mandate ID** and **Mandate status**, remain on the Details tab.

## Recurring Gift History Tab

We removed the History tab on the recurring gift record as historical information has been absorbed into the Activity tab timeline. For more information about the timeline, see Recurring Gift Activity Tab on page 92.

Note that the Revenue history and Constituent revenue history pages remain.

## Recurring Gift Status Changes

We refreshed the way you edit recurring gift statuses and streamlined status names and reason codes.

- To edit the status of a recurring gift, you can now click **Edit status** under the new recurring gift badge in the **Transaction summary** section (note that the **Edit status** link under **Tasks** on the explorer bar still remains). From the Edit recurring gift status screen that appears, you can select a new status and reason code.

  ***Tip:*** When you select a "Held" status, you can enter the total number of installments to skip. For information about skipping installments, see Skip Recurring Gift Installments on page 96.

- On the Edit recurring gift status screen, we added the **Recurring gift is currently** field along with the status to easily identify the current status. You can now select a new status using the **Set new status** field and select a reason code from the new **Reason code for status change** field.

- To specify reason codes for a recurring gift status change, from the Reason Codes page in *Revenue*, we added the **Recurring gift status change** section to the Revenue tab. When you add

a reason code, you can select a status type, and enter a reason and description. The following status options are hard-coded and cannot be changed: Active, Held, Terminated, Canceled, and Lapsed.

***Note:*** Any reason code you add for the "Held" status is available for skipped installments.

- We renamed the "Completed" status to "Canceled." Additionally, an end date is now assigned to all existing Completed/Canceled recurring gifts.

  ***Warning:*** Now that all existing Completed/Canceled recurring gifts have an end date, new and existing queries that filter on recurring gift end date may include a larger number of results than in previous releases. After upgrading, we recommend you review all queries and reports as results may have changed.

- We added the "Lapsed" status which Indicates that a donor is not currently in good standing.

  ***Tip:*** When a payment is applied to a recurring gift with a "Lapsed" status, the status automatically changes to "Active."

- For a Revenue query, we added the "Lapsed" and "Canceled" (formerly Completed) status options to the following filter fields: **Recurring gift status**; **Appeal\Revenue\Recurring gift status**; and **Revenue Splits\Revenue Details\Recurring gift status**. Note that existing queries will still use "Completed" while new queries will use "Canceled."

## Recurring Gift Statuses - Defined

Active, Lapsed, and Held statuses are used for open recurring gifts where payments are expected either now or in the future. Any of these status values will always have at least one expected installment either today or in the future.

- **Active** - Indicates that the donor is in good standing regarding their payments against this commitment.
- **Lapsed** - Indicates that a donor is not currently in good standing. Use the **Update recurring gift statuses** business process to define rules that identify when a recurring gift should become Lapsed. You can also manually change the status of a recurring gift to Lapsed.
- **Held** - Indicates that the next installment, either today or in the future, has been skipped, but payments are expected to resume again in the future (based on the date of the next expected installment).

Canceled and Terminated statuses are used for recurring gifts against which the donor no longer plans to make payments.

- **Canceled** - Indicates that the donor made a request to stop payments.

  When a donor requests to end a commitment on a future date, that date can be specified in the recurring gift's **End date** field. The **Update recurring gift statuses** business process automatically updates recurring gifts to Canceled when the **End date** has passed.

  You can also immediately change a recurring gift to Canceled by editing the recurring gift status. When you make this change, the current date will be set as the **End date** of the recurring gift.

  > ***Warning:*** All existing Completed/Canceled recurring gifts now have an end date. Note that new and existing queries that filter on recurring gift end date may include a larger number of results than in previous releases. After upgrading, we recommend you review all queries and reports as results may have changed.

- **Terminated** - Indicates that the donor stopped making payments. The donor is considered delinquent in regards to this commitment. Use the **Update recurring gift statuses** business process to define rules that identify when a recurring gift should become Terminated. You can also manually change the status of a recurring gift to Terminated.

## Recurring Gift Installment Generation

As a reminder, the program creates installments during the following scenarios:

- When a payment is applied to a recurring gift and the latest installment has a date prior to the date of the payment.
- When a write-off is applied to a recurring gift, and the latest installment has a date prior to the date of the payment.
- When an expected installment is skipped and no other expected installment exists.
- When a recurring gift has a "Held" status for a length of one or more installments.

## Skip Recurring Gift Installments

From the Activity tab, you can now skip any expected installment as long as the installment date is no more than five days prior to the current date. To skip an installment, click the double arrows next to an installment to expand its row. From the action bar that appears, click **Skip installment**.

From the Skip installment screen, you can enter the number of installments to skip and specify a reason code for the skip.

You specify reason codes for skipped installments from the Reason Codes page in *Revenue*. On the Revenue tab, under **Recurring gift status change**, any reason code you configure for the "Held" status is available for skipped installments.

***Tip:*** In a Revenue query, the **Recurring Gift Write-offs** node now includes a **Type** field where you can specify "Write-off" or "Skip."

## Write-Off Recurring Gift Installments

On the Activity tab of a recurring gift record, we made the following enhancements to the installment write-off functionality:

- We removed the **Write-offs** section. Installment write-offs are now tracked on the activity timeline and display as "Installment # – Write-off."

- To write off one or multiple installments, on the action bar, click **Write-off installments**. The Write-off recurring gift installments screen displays all installments eligible for a partial or full write-off. You can enter a write-off date and the amount to write off, and select a reason code.

- You can also write off an individual installment from an installment row in the activity timeline. Click the double arrows next to an installment to expand its row. From the action bar that appears, click **Add a write-off**. From the Add a write-off screen, enter a write-off date and amount, and select a reason code.

- To edit and delete one or multiple write-offs from an installment row in the activity timeline, click the double arrows next to a written off installment to expand its row. From the action bar that appears, click **Manage write-offs**. From the Manage write-offs screen, edit the write-off date, amount, and reason code for all written off installments.

***Tip:*** In a Revenue query, the **Recurring Gift Write-offs** node now includes a **Type** field where you can specify "Write-off" or "Skip."

## Add and Edit a Recurring Gift Record

On the Add a recurring gift and Edit a recurring gift screens, we made the following field changes:

- **Designation** is now **Designations** (Edit screen only).
- **Recurring gift is anonymous** is now **Make this recurring gift anonymous**.
- **Frequency** is now **Installment frequency**.
- **Starting on** is now **Installment schedule begins**.
- **Next transaction** is now **Next installment date**.
- **Ending on** is now **End date (optional)**. The recurring gift ends on this date (no installments are generated after this date). The Update recurring gift statuses business process can automatically change the gift's status to "Canceled" after this date expires.

On the Add a recurring gift screen, the **Pay installments automatically by** checkbox is now **Payment method**. The following options have been changed or added:

- "Credit card" is now "Credit card – pay installments automatically"
- "Direct debit" is now "Direct debit – pay installments automatically"
- We added "Credit card – store last 4 digits for reference." This option is used for reporting and reconciling, and is not used to process payments. We added this to accommodate recurring gifts in ***Luminate Online*** that need to be reflected in ***Blackbaud CRM***.
- We added "Other." When you select this option, the **Other method** field appears where you can select a different payment method. We included this option to better accommodate international payments and in preparation for future international features.

  - ***Tip:*** In *Administration*, your system administrator configures the payment methods available for a payment in the form of "Other." If the method you want does not appear, consult your system administrator.

- We added "None." When you select this option, you signify that the payment method is unknown. This is the equivalent of deselecting the **Pay installments automatically by** checkbox

in previous versions.

## Sponsorships

We made field and option changes for the Add, transfer, and reassign sponsorship screens as well as the Add a recurring additional gift screen:

- **Frequency** is now **Installment frequency**.
- **Starting on** is now **Installment schedule begins**. The installment schedule begins on this date. The dates of subsequent installments are calculated based on this date and the frequency of the payment.
- **Ending on** is now **End date (optional)**.

The **Pay installments automatically by** checkbox is now **Payment method**. The following options have been changed or added:

- "Credit card" is now "Credit card – pay installments automatically"
- "Direct debit" is now "Direct debit – pay installments automatically"
- We added "Credit card – store last 4 digits for reference." This option is used for reporting and reconciling, and is not used to process payments. We added this to accommodate recurring gifts in ***Luminate Online*** that needed to be reflected in ***Blackbaud CRM***.
- We added "Other." When you select this option, the **Other method** field appears where you can select a different payment method. We included this option to better accommodate

international payments and in preparation for future international features.

- ***Tip:*** In *Administration*, your system administrator configures the payment methods available for a payment in the form of "Other." If the method you want does not appear, consult your system administrator.

- We added "None." When you select this option, you signify that the payment method is unknown. This is the equivalent of deselecting the **Pay installments automatically by** checkbox in previous versions.

## Batch

For Revenue Update Batch, Enhanced Revenue Batch, and Sponsor Batch, we added "Credit card - store last 4 digits for reference," however, "Credit card" and "Direct debit" remain unchanged.

For details about the payment method field and option changes, see Add and Edit a Recurring Gift Record on page 99 and Sponsorships on page 101.

# Update Recurring Gift Statuses Business Process

With this release, we created the **Update recurring gift statuses** business process. Using this process, you can define rules to update multiple statuses in the same business process. You select to include specific payment methods, identify frequencies, and define rules for how the program handles recurring gift statuses during the update process. For example, you can create a rule to update installments to "Past due" when they have an unpaid balance 30 days past the installment date.

***Note:*** Only users in these roles can access the **Update recurring gift statuses** business process: Annual Fund Manager and Director of Development.

***Warning:*** With this release, the **Update recurring gift statuses** business process will not update recurring gift statuses for sponsorships; however, the process does include sponsorships in order to update installments to "Past due."

***Show Me:*** Watch the walkthrough and related videos to learn more about the enhancements

### Does the "Set recurring gift status" global change still exist?

Yes. This global change remains available (through *Administration*). While this global change is still available and also allows you to update statuses in bulk, the new business process gathers all necessary functionality in a single place and by using a set of rules, ensures that the correct records are updated.

It is important to note that we removed the ability to set recurring gifts to "Held" using the global change. This affects any new global change instances you create. For existing global change instances, a message appears informing you that setting recurring gifts to "Held" is not supported. For more information about recurring gifts marked as "Held" prior to this release, see Existing "Held" Recurring Gifts on page 106.

The following sections include information about all areas we improved to support the new **Update recurring gift statuses** business process.

## Update Recurring Gift Statuses Page

On the Revenue page, click **Update recurring gift statuses** to access the Update Recurring Gift Statuses page. From here, you can add, edit, and start your update processes.

Click the name of a business process to access its status page, which includes Recent Status, History, and Job Schedules tabs.

***Tip:*** From the History tab of a process status page, to view additional details about the process, you can click the double arrows next to a process status to expand its row. From the action bar that appears, click **View status page** to view a detailed breakdown of process outcomes.

## Add a Recurring Gift Status Update Process

On the Add a recurring gift status update process screen, you can select to update recurring gifts that meet specific criteria, define rules for statuses, and preview updates prior to running the process.

- On the General tab, specify a payment method and frequency, or update recurring gifts based on a selection. It is important to note the following payment method options:

  **Credit card - pay installments automatically** - Select this option to include all recurring gifts with a payment method of "Credit card - pay installments automatically."

  **Credit card - store last 4 digits for reference** - Select this option to include all recurring gifts with a payment method of "Credit card - store last 4 digits for reference." This payment method is for reporting and reconciling, and is not used to process payments.

  **Direct debit - pay installments automatically** - Select this option to include all recurring gifts with a payment method of "Debit card - pay installments automatically."

  **Other** - Select this option and specify another form of payment method.

  **None** - Select this option when the payment method is unknown.

- On the Rules tab, define rules for when the program will update recurring gifts to "Lapsed" or "Terminated," and when the program will update "Expected" recurring gift installments to "Past due."

***Warning:*** To ensure past due amounts display in the program, you must create a recurring gift status update business process and define a rule for "Past due." The program uses this rule to update unpaid installments to "Past due." These "Past due" installments are then reflected in the recurring gift's past due amount. For more information about past due amount calculations, see Past Due Amount Calculations on page 106.

- On the Preview tab, you can review the rules you defined on the Rules tab as well as hard-coded rules the program respects during the update process.

  For example, this process updates recurring gifts to "Canceled" when their end date has passed. This process also updates "Held" recurring gifts to "Active" when skipped installments are in the past.

## Past Due Amount Calculations

We made changes to the way past due amounts are calculated throughout the program.

To ensure non-zero past due amounts display in the program, you must create a recurring gift status update business process and define a rule for "Past due." The program uses this rule to update unpaid installments to "Past due." All "Past due" installments are then reflected in the recurring gift's past due amount. We recommend you run the business process on a consistent schedule.

Previously, a recurring gift's past due amount was calculated as the sum of installment balances with dates in the past. With this release, past due amounts are now calculated as the sum of installment balances with a status of "Past due." To update installments to "Past due," you must run the recurring gift status update business process. For more information about this business process, see Update Recurring Gift Statuses Business Process on page 102.

***Note:*** Sponsorship areas were also updated to reflect the new calculations, including the Sponsorship Past Due report as well as the **Past due**, **Total past due**, and **Carry forward** fields throughout *Sponsorship*. Additionally, the Sponsorship delinquency smart query now only returns records for "Past due" installments.

If your organization must model past due amount calculations from previous versions, we recommend you run the recurring gift status update business process daily using the following criteria:

1. On the General tab, leave all default options selected.
2. On the Rules tab, select **Change unpaid installments to Past due**. Then select **Installments are Past due when they have an unpaid balance "1" day past the installment date**. Ensure you enter "1" day.
3. Clear the **Change Active recurring gifts to Lapsed** and **Change Lapsed recurring gifts to Terminated** options.

# Existing "Held" Recurring Gifts

Prior to version 4.0, recurring gifts with a "Held" status remained "Held" until you reactivated them. In version 4.0, "Held" recurring gifts must be associated with one or more skipped installments, and the **Update recurring gift statuses** business process can be used to automatically reactivate "Held" recurring gifts at the appropriate time. The business process excludes any recurring gifts that were "Held" prior to version 4.0 in order to prevent them from being reactivated (since they are not associated with any skipped installments).

When you run the business process, a message appears and indicates the number of "Held" recurring gifts that existed prior to version 4.0. In order to be included in the business process, we recommend you review these gifts and update their statuses as appropriate.

***Tip:*** Use the "Legacy Held Recurring Gifts" selection to locate "Held" recurring gifts that existed prior to version 4.0.

For more information about recurring gift statuses, see Recurring Gift Statuses - Defined on page 96. For more information about skipping installments, see Skip Recurring Gift Installments on page 96. For

more information about the **Update recurring gift statuses** business process, see Update Recurring Gift Statuses Business Process on page 102.

## Batch Lockdown for Credit Card Processing

When you run a Credit card processing process, we now lock the batch while the cards are being processed so that a user cannot change information about a transaction that has already been sent to the ***Blackbaud Payment Service***. After the cards are processed, the batch is unlocked. Previously, the batch was not locked and payment information could be changed while the cards were processed which could cause a mismatch between the transaction information in ***CRM*** and in the ***Blackbaud Payment Service***.

# Treasury

## Credit Card Reconciliation

To promote a more efficient workflow and reduce the amount of time it takes to reconcile your credit card activity, we enhanced the credit card reconciliation process. You can now identify and work with all reconciliation items from the new Reconcile transactions and disbursements page in *Treasury*.

In addition, to more closely align the program with the way your organization works with credit card reconciliation, we replaced all references of "settle" and "settlement" with "reconcile" and "reconciliation" throughout *Treasury*. These terminology changes apply to the Treasury page, screen details, links, field names, and tooltips as they relate to credit card reconciliation.

The following sections include details about the new Reconcile transactions and disbursements page as well as status and reconciliation considerations we recommend you review.

***Show Me:*** Review the walkthrough to learn more

***Show Me:*** Review the video to learn more

### Reconcile Transactions and Disbursements Page

On the Treasury page, click **Reconcile transactions and disbursements** (formerly **Outstanding credit card transactions**) to access the new Reconcile transactions and disbursements page so you can reconcile credit card transactions based on your disbursement report and transaction activity.

From the Reconcile transactions and disbursements page, under **Tasks**, you can reconcile transactions using an automated process or a manual upload. Click **Enable BBMS auto reconcile** (formerly **Enable BBMS auto settle**) to enable the automated process only available with ***Blackbaud Merchant Services***. Alternatively, you can click **Upload disbursement report** (formerly **Upload settlement report**) to manually upload a disbursement report. When you upload the report and select a report format, the program searches for and compares the credit card transactions in the report with transactions in your database.

***Note:*** You can also upload a disbursement report from the Treasury page. Under **Credit card reconciliation**, click **Upload disbursement report**.

The Reconcile transactions and disbursements page is organized into five tabs, giving you the ability to view reconciliation details by transaction or disbursement. You can also work with unmatched disbursements as well as suspect and chargeback transactions processed through ***Blackbaud Merchant Services***.

# View Reconciliation Details by Transaction

On the View by transaction tab, you can view all or specific credit card transactions entered into the database during a selected time period.

Use the **Show** field to specify transactions such as Reconciled or Pending. In the **Transactions for** field, select the date range of the transactions to view, such as Today or This month. Use the **Gateway ID** field to display transactions associated with a specific gateway ID or all gateway IDs.

From this tab, you can manually mark transactions as Reconciled or Pending, and view transaction details. For transactions processed through ***Blackbaud Merchant Services***, you can also approve or refund suspect transactions, and view gateway details.

# View Transactions by Disbursement

On the View by disbursement tab, you can view all or specific credit card transactions entered into the database during a selected time period, grouped by merchant disbursement date. Use the **Disbursements for** and **Gateway ID** filters to further narrow your results.

After you upload a disbursement report, reconciled and unmatched transactions display on this tab as well as any transactions held as pending, disputed, resolved, or refunded due to a chargeback request from the cardholder. Fraud fee transactions signify a credit card processing fee associated with the ***Fraud Management*** service offered through ***Blackbaud Merchant Services***.

For transactions processed through ***Blackbaud Merchant Services***, click **BBMS Report** next to a disbursement date header to access the ***Blackbaud Merchant Services*** Disbursement Detail Report. Previously, you could only access this report through the ***Blackbaud Merchant Services*** web portal.

You can also view gateway details for automatically reconciled transactions processed through ***Blackbaud Merchant Services***.

***Note:*** Transaction details are only available for transactions settled with this release or higher. Previously settled and unmatched transactions do not display transaction details.

# View Unmatched Disbursements

On the Unmatched disbursements tab, after you upload a disbursement report, you can view any transactions in the report that do not match corresponding transactions in your database, such as a transaction submitted to a payment processor from outside the program.

In the **Transactions for** field, select the date range of the transactions to view, such as This month or This Quarter. Use the **Gateway ID** field to further narrow your results.

Unmatched disbursements exist for various reasons. For example, your organization may have submitted these transactions to the processor from outside of the program, or the automatic reconciliation may not have successfully matched these transactions with their counterparts in the database. An unmatched status may also occur when transactions successfully matched corresponding transactions, but were not automatically reconciled because time zone differences caused transaction date inconsistencies.

From this tab, you can manage these transactions as necessary. You can remove a transaction from the list, or search the database for a transaction's match.

# View Suspect Transactions

On the Suspect charges tab, review transactions processed through ***Blackbaud Merchant Services*** and flagged as suspect when they meet specific criteria. Transactions flagged as suspect help avoid costly fees associated with potentially unnecessary transactions. Examples of suspect criteria include a questionable IP address or multiple identical transactions from the same credit card within a short amount of time.

***Tip:*** The number that displays next to the Suspect transactions tab header offers a quick view of the number of suspect transactions that exist.

From the Suspect charges tab, you can filter transactions by **Gateway ID**, view transaction and gateway details, and select to approve or refund transactions.

***Note:*** To promote a more streamlined experience, we removed the **Suspect transactions** and **Chargeback transactions** links that previously existed directly on the Treasury page.

# View Chargeback Transactions

On the Card chargebacks tab, use the **Status** filter to review specific chargeback requests processed through ***Blackbaud Merchant Services***. Chargeback transactions occur when a card holder disputes the validity of a transaction with the credit card company. For example, if the credit card used is reported stolen or the card holder does not recognize the transaction, the credit card company issues a chargeback request to ***Blackbaud Merchant Services***.

***Tip:*** The number that displays next to the Card chargebacks tab header offers a quick view of the number of chargeback transactions that are pending review.

From this tab, you can filter transactions by **Gateway ID**, view transaction and gateway details, and select to accept or challenge transactions.

***Note:*** To promote a more streamlined experience, we removed the **Suspect transactions** and **Chargeback transactions** links that previously existed directly on the Treasury page.

## Status Overview

On the View by transaction and View by disbursement tabs of the Reconcile transactions and disbursements page, you can view various status indicators in the **Status** column for a transaction.

- **Reconciled** signifies that transactions in the disbursement report correspond to transactions in your database.
- **Pending** signifies that transactions exist in your database, but have not been reconciled to a disbursement transaction. This status only displays on the View by transaction tab.
- **Suspect** transactions are automatically flagged by ***Blackbaud Merchant Services*** when they meet specific criteria. Transactions flagged as suspect help avoid costly fees associated with potentially unnecessary transactions. ***Blackbaud Merchant Services*** does not disburse funds from a suspect transaction until you approve it. You can view suspect transactions from the View by transaction tab and Suspect charges tab.
- **Unmatched** disbursements display any transactions in the disbursement report that do not match corresponding transactions in your database. Unmatched transactions display on both the View by disbursement and Unmatched disbursements tabs.
- **Fraud fee** is a credit card processing fee associated with the ***Fraud Management*** service offered through ***Blackbaud Merchant Services***. These fees display on the View by disbursement tab for informational purposes.
- **Chargeback pending** signifies chargeback requests. When a card holder disputes the validity of a transaction with the credit card company, the credit card company issues a chargeback request to ***Blackbaud Merchant Services***.
- **Chargeback disputed** signifies chargeback requests that have been challenged.
- **Chargeback resolved** signifies chargeback requests that have been addressed. This is the final status applied to a chargeback transaction.
- **Chargeback refund** signifies a refund transaction. After ***Blackbaud Merchant Services*** issues a refund, a chargeback refund transaction is generated and displays on the View by disbursement tab. If a corresponding transaction exists in the program, you can update the original transaction as necessary.

# Blackbaud Internet Solutions

## Internet Explorer 11 Support

***Blackbaud Internet Solutions*** now includes administrative and website browser support for *Internet Explorer 11* (*IE11*). For example, you can use *IE11* to create a web page from *Site explorer*, *Pages & templates*, and a website user can use it to access the page on your site.

To support the full-page functionality testing that is required for the new browser, *Internet Explorer 8* is no longer supported.

***Note:*** When you use non-supported browsers, you can still log in and use the program and website pages, but some features may not render correctly.

For a full list of supported browsers, refer to the System Requirements.

# Image Library

To help support profile image enhancements in this version and to provide better image search functionality, the new **Image owner** field now appears on the Search tab in *Image library*. Use this field to search for an image by the owner's first name or last name. The image owner is the person who originally uploaded the image to your website. These images may have been uploaded by someone at your organization for a web page or they may have been uploaded by a website user for a profile page.

***Note:*** For more information about the profile image enhancements, see Profile Update Form on page 125.

# Blackbaud Secure Payment API

***Blackbaud Internet Solutions*** includes new API endpoints that allow custom parts to use Blackbaud's secure payment page. For example, a customization can pre-populate the Blackbaud secure payment page with biographical information entered on the custom part to improve data entry speed for donors. A customization can also store a donor's credit card information.

***Note:*** The Blackbaud secure payment offers additional flexibility, but comes with additional complexity. If you host your own website, we strongly recommend only developers knowledgeable in all areas of customizations design this page. This includes using endpoints, objects, and the API, as well as writing HTML and JavaScript code. Users without this expertise should not design this page. For information about the API, see the Developer Guide. If Blackbaud hosts your website, customizations can only be completed by Blackbaud or one of our designated partners. For more information, please contact your Blackbaud Account Executive.

The following end points are now available.

- AmountAsCurrency
- ApplicationIdentifier
- ApplicationPreferredName
- Note
- Source As TransactionSource
- Transaction
- VerificationMethod As VerificationMethod

In ***Blackbaud Internet Solutions*** 3.0 service pack 5, the following endpoints were added to support this functionality.

- BBNCExtensions.Parts.CustomPartBBSPEditorBase
- BBNCExtensions.Parts.CustomPartBBSPDisplayBase
- BBNCExtensions.API.NetCommunity.Utility.SecurePayments
    - StoreCardInfo
    - CardNotPresent
    - TransactionResponse
    - Redirect

## Parts

The following *Parts* enhancements are available. For more information, refer to the *Parts Guide*.

# Language Tab Changes

Updates to the Language tab include a new default message for incorrect reCAPTCHA entries on forms and an option to change the default value that appears in drop down fields.

***Note:*** For information about updates to the Language tab for the Donation Form and Payment 2.0 parts, refer to Donation Form on page 1 and Payment 2.0 on page 1.

This table lists the category where the option appears for each part.

| Part | Category |
|---|---|
| Donation Form | Donation Information |
| Event Registration Form | Registration |
| User Login | Registration Form |

# reCAPTCHA Failed Message

The default message that appears when website users enter incorrect values for reCAPTCHA images on forms is changed. Previously, the message instructed users to enter "the words" shown in the reCAPTCHA image. Now, the message instructs them to enter "the characters" since the images typically include both text and numerical values.

To change the new default message, navigate to the Language tab on the parts that include reCAPTCHA and update the text in the **reCAPTCHA failed message** row.

This table lists the Language tab category for each part that includes the row.

| Part | Category |
|---|---|
| Donation Form | Validation Messages |
| eCards | reCAPTCHA |
| Payment | Validation Messages |

| Part | Category |
|---|---|
| Payment 2.0 | Validation Messages |
| User Login | reCAPTCHA |

# Default Value for Drop Down Fields

A new **Default value for drop down fields** option is available on the Language tab so you can specify the text that appears when no value is selected for a field. Previously, <Please Select> always appeared as the default value, regardless of a page's language setting.

This table lists the category where the option appears for each part.

| Part | Category |
|---|---|
| Donation Form | Donation Information |
| Event Registration Form | Registration |
| User Login | Registration Form |

# Directory

***Show Me:*** Review the walkthrough to learn more

When website users open profile pages from Directory part search results, a new **Back to search results** link appears at the top. Users click the link to return to the directory and view their search criteria and results.

This website usability enhancement eliminates the need for users to click menu links or the browser back button to return to the directory page. It also saves users time from entering search criteria again.

***Note:*** This link does not appear for Chapter Manager part directories.

# eCards

A new **Require eCard recipient's name** field appears on the eCards part to prevent blank values in merge fields that you add to eCard messages. When you select this option, the program requires website users to enter a value for **First name**.

# Transaction Manager

When you design a Transaction Manager part, the **Select the tabs to display** section now appears so you can select whether to display only the History or Active tabs on your website.

To display both tabs on your site, you can select **Both tabs**. When you do this, a field appears on the right for you to select the tab to display when users first access the part on a page.

***Tip:*** When you upgrade to this version, both tabs continue to appear on your site and the Active tab still displays first.

In addition, the Language tab text you enter in the "Transaction Manager - Help Text" category to clarify each tab's purpose to users now appears at the top of the tab.

These improvements were made to provide additional flexibility with the part based on your organization's needs and preferences. For example, if you did not want the Active tab to appear in the

past, you can now remove it. If you want both tabs to appear, but prefer the History tab appears first, you can now select to do this.

## User Login Part: Constituent Attributes

In ***Blackbaud Internet Solutions***, the User Login part now includes the ability to change the order of the constituent attributes appearance on the form and modify their labels. Under **Attributes**, click and drag the dotted button on the far left to move an attribute in the updated grid. To change the label text, enter it in the **Caption** field.

These updates provide flexibility so you can specify how the attributes should appear on the form, such as if you want them in the same order as they are arranged in ***Blackbaud CRM***.

## Email Templates

***Show Me:*** Review the walkthrough to learn more

To improve email marketing for mobile users, six new mobile friendly email templates are available for you to copy and use as new templates. These templates are more narrow in width and include larger fonts for improved usability on mobile devices. They also render more consistently across mobile devices, browsers, and desktop and web-based email programs. You can easily identify these in the email templates grid by viewing templates with “Placeholder” in the **Description** column.

To copy a mobile friendly template, select the one you need. In the **Action** column, click **Click here to copy this email template**. After you copy it, update all placeholder text with your unique content in the new email template. For example, you can replace the merge field placeholder text with merge fields in the HTML editor. You can also replace the sample logo banner with your organization's logo banner.

(Design)
Save
New message
New template
Copy template
Return
Properties
Design
Messages
Formatting
Insert
View
Image
Cut
Copy
Paste
Font family
Font size
LOGO
ORGANIZATION
BANNER
525x100
Dear [insert First Name or other merge field],
[1-2 sentence description of the urgent problem you're working to address. Describe the problem vividly from the perspective of those you serve – e.g. those in need, students, etc.]
[1-2 sentences that describe how the email recipient can be the hero, instead of your organization. Describe how taking an action at this moment will resolve this problem.]
[Link to donation form that tells the email recipient how they can be the hero in resolving this problem right now.]
[1-2 sentence description of what it means to be a supporter of your organization.]
[1-2 sentences describing the background/history of the problem you're addressing and the negative outcome(s) that has occurred]
[Brief link on how they can help]
Sample Photo
160 x 200px
[Caption or link - highlight problem]
Sample Photo
150 x 44px
Your help will ensure [the change that will occur if the email recipient takes an action]
It doesn't take much to [insert problem you're addressing]:
• $XX will pay for [outcome of gift]
• $XX covers the cost of [outcome of gift]

Below is a list of the six mobile friendly email templates. To secure the content in the templates, you cannot edit or delete them.

- Campaign Email #1 – Kickoff
- Campaign Email #2 – Follow-up
- Campaign Email #3 – Last Chance
- eNewsletter Template
- Holiday Greetings Template
- One Column Template

***Tip:*** One copy of each mobile friendly email template exists in the program. When you host multiple websites, you access them in each site's *Templates* area.

# Administration

The following *Administration* enhancements are available. For more information, refer to the *Administration Guide*.

## User Image Options Setting

To help support the profile image enhancements and so you can improve how you organize images, a new **Default profile image folder** field now appears in site settings for images. In this field, select the default folder profile images upload to in *Image library*.

***Note:*** For more information about the profile image enhancements, see Profile Form on page 1.

When you select **Require approval for all images uploaded by users**, you must approve each profile image in the *Image library* before it appears on your website. Until you do this, it only appears for the user who uploads it.

## Custom Error Page

***Show Me:*** Review the walkthrough to learn more

In *Sites & settings*, a new **Error page** field is available under **Pages** on the Settings tab for default, parent, and child sites. In the field, you select a web page from *Pages & templates* to appear if errors occur.

This allows you to create a custom message and include information to help identify the causes of errors.

***Note:*** If you do not select an error page, system messages from *Internet Information Service (IIS)* appear when errors occur.

To provide detailed information in the message, use the new error merge fields in a Formatted Text and Images part. The merge fields insert responses from the website server if pages do not load properly. The error merge fields include:

- Error code — The numeric portion of a standard response code, such as 404 or 406.
- Error description — The reason for a standard response code, such as not found or not acceptable.

- Error log ID — The database number that corresponds to the server error.

  ***Note:*** Error log IDs help Blackbaud Support track the reasons for errors on your website.

# Favicon Images

***Show Me:*** Review the walkthrough to learn more

You can now add branding to your web address so users can quickly associate it with your organization. Use the new **Favicon image** field in general site settings to select a small icon to represent your website. The image appears in browser address bars and locations where users save your website URL, such as browser favorite lists.

To add a custom favicon to your site, click **Browse** beside the **Favicon image** field and select an .ico image file. We recommend you upload a 16x16 or 32X32 pixel image for maximum display quality in modern browsers on desktop and mobile platforms. If you select an image with a different file type or size, or if the file does not convert correctly to .ico, the file may not render correctly in all browsers.

***Note:*** The image file size must be 50KB or less.

Previously, websites rendered favicons in browser address bars only when an .ico file was sized and saved in *Image library*.

***Tip:*** If Blackbaud hosts your website, we recommend you add a favicon image to prevent issues when there are environment changes.

# Forms

The following *Forms* enhancement is available. For more information, see the *Forms Guide*.

# Communication Preferences Form: Active Email Addresses

When you include the **General Correspondence** element on a Communication Preferences form, only active email addresses now appear. Previously, the element included inactive email addresses but not inactive mailing addresses. This change creates consistency between the email and mailing address behavior.

***Tip:*** To ensure correct email addresses appear on forms, we recommend you properly maintain historical dates on email addresses.

# Profile Update Form

***Show Me:*** Watch a video about the new profile image enhancements and review the walkthrough to learn more.

To simplify profile image management for your organization and improve the website user experience for profile images, the Profile Update Form now includes a **Profile image** element. When you include this in the design area, you provide the ability for website users to easily add, edit, or remove profile images.

***Note:*** When you implement this new profile image feature, the program automatically uses the most recent profile image for a user as the current profile image.

When a profile image displays on a profile web page, a square thumbnail of the user's image appears. The user can change or remove the image by clicking the links below it.

***Note:*** When a website user has an existing profile image and uploads a new one on the profile page, the new profile image overwrites the previous image. This occurs on your website and in *Image library*.

To select the portion of it that appears as the profile, the user clicks the thumbnail image. On the screen that appears, the user drags the box to highlight the portion of the image to display and a thumbnail example appears on the right.

Before a user uploads a profile image, a default silhouette image appears as the profile. A link to add an image appears below the silhouette.

***Tip:*** To help support the profile image enhancements and improve how you organiz and search for profile images, there are additional new features in *Image library* and *Administration*. For more information, seeImage Library on page 113 andUser Image Options Setting on page 122.

## User Photos Form

Previously, profile images saved as a profile image type when they were uploaded on the User Photos Form part. With this release and the profile image enhancements on the Profile Update Form, images uploaded on the User Photos Form save as a personal type. You can design these images to display on the web page with the profile image from the Profile Update Form.

***Warning:*** After you implement the new profile image on the Profile Update Form, we recommend you remove any User Photos Form parts that display profile images. If you do not remove them from your website, you risk inadvertently overwriting profile images. The most recent image uploaded by users remains as the current profile image automatically when you use the new profile image. Therefore, you can remove these User Photos Form parts from your site.

When an image's tag is the same as the tag selected on the User Photos Form part, the image displays on the page regardless if the image type is personal or profile. Previously, only profile image types displayed. To view personal and profile image types in your database, in *Image library*, select the type to view in the **Type of image** field on the Search tab. You can view the tags for an image on its properties.

## Profile Display

As a part of the profile image management enhancements, the Profile Display part now includes a **Profile image** merge field in the HTML editor and height and width fields for you to configure maximum profile image sizes.

In the **Max height/width for full-size image** field, you enter the maximum display height and width for full-size profile images that display when users click thumbnails on the web page. In the **Max height/width for thumbnails** field, you enter the maximum height and width for profile image thumbnails on the web page.

The HTML editor includes the **Profile image** merge field on the Individual tab. To display the image a user uploads on the Profile Update Form, include this merge field in the design box.

When you do this, the image appears on the read-only profile display web page for other website users to view. The square cropped image that a user selects on the Profile Update Form displays as the profile image thumbnail. When website users click the thumbnail, the full-size image displays.

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# Service Pack 1

These features were introduced in Service Pack 1 after the original ***CRM 4.0*** release.

## Part Removal Safeguard

To prevent you from inadvertently removing active content from your ***Blackbaud Internet Solutions*** website, you can no longer delete parts when they are associated with web pages. When you attempt to delete a part that is associated with a single site, or shared across multiple sites, a message appears to inform you that you cannot remove it because it exists on a page.

To identify the pages where the part appears, select the part's Usage tab.

# Blackbaud Internet Solutions Security Update

As part of our normal product improvement processes, we review our security measures, protocols, and infrastructure on an ongoing basis. ***Blackbaud Internet Solutions*** was automatically updated in this release to include security improvements which address vulnerabilities that could potentially compromise the integrity of our product. Please refer to this list to determine whether your organization needs to take any action.

- If your organization uses a customization to provide website registration or login functionality, the customization may not work correctly if it directly accesses the ClientsUsers table in the database. Instead, we recommend customizations use the methods contained in the Blackbaud.Web.Content.Core assembly and User class. If your organization uses standard ***Blackbaud Internet Solutions*** functionality for user login and password reset or if your customization calls passwords via the Blackbaud.Web.Content.Core assembly and User class, no action is required on your part.
- If your organization uses an iFrame from a third party website to direct users to ***Blackbaud Internet Solutions*** Donation, Event Registration, Membership, Sponsorship Form, or Sponsorship Search parts, you need to update the website to direct users to a form on a ***Blackbaud Internet Solutions*** page. We recommend you design the page to include the same look and feel as your third party site so that users seamlessly transition to the ***Blackbaud Internet Solutions*** page.

***Note:*** Blackbaud historically has not recommended the use of iFrames due to security issues. For more information, read the Knowledgebase article here.

# Password Reset Page Link

To improve password reset security in email messages from ***Blackbaud Internet Solutions***, you now select a user login password reset page from the **Create link to a special page** option on the HTML Editor when you design the email message.

***Tip:*** The ability to create a special page to link to your user login page (that you define for **Page** settings in *Sites & settings*) previously existed. With this feature, any page that contains a User Login part now appears from the drop down and you want to select the user login page that navigates users to your forgotten password page.

This new link remains active in an email for the user to take action to reset the password any time.

When an email recipient clicks the link, a secure page appears with a **Forgotten Password** field for the user to enter their email address.

After the email address is submitted, another email sends to the user. That email contains another link that returns the user to the password reset page on your website.

Previously, the **Password** merge field was available in email messages that use a Registered Users data source. With this update, this merge field no longer includes the password in an email. When a recipient receives the message, the placeholder for the field is blank. As a result, make sure you remove the **Password** field and create user login password reset page links in email messages to guide your users to reset their password.

# Social Media Login Welcome Email

Now when Blackbaud Internet Solutions website users register for the site with social media login credentials, the program sends them a confirmation email to welcome them to the site. Previously, the program did not send these users an email. The program uses the same welcome email template you configure for other website registrants, but it merges "<social media username> via <social media account>" in the Username field.

# Save and Close Options for Query

Previously, when you clicked **Save** from the Ad-hoc query screen in *Analysis*, the program saved your changes and closed the screen. Now, you have the option to click **Save** to save your changes and continue working with the query, or click **Save and close** to save your changes and close the screen.

# Save and Close Options for Export Definitions

Previously, when you clicked **Save** from the Export Definition screen in *Administration*, the program saved your changes and closed the screen. Now, you have the option to click **Save** to save your changes and continue working with the export definition, or click **Save and close** to save your changes and close the screen.

# Date Field Changes for Data List Exports to Excel

Now when you export a data list that includes date fields to Excel, the spreadsheet includes date and time information when a time is saved for any of the dates in the list. Previously, the spreadsheet only included date information, so when a date included the latest time in the day such as 11:59:59.999 PM for a membership expiration, Excel rounded the date to the next day.

# Enhanced Contribution Criteria for Membership Programs

When you create a contributions-based membership program, you determine which giving activity is counted toward the levels of the membership. The options for setting up the criteria are on the Contributions tab when you add a program and on the Rules tab when you edit a program. However, now you can get even more specific by using a Revenue Application selection or Installment Plan Payment selection instead of the predefined checkboxes and options. The criteria you use in the query will determine which giving activity is counted.

When you upgrade, existing contributions-based membership programs continue to work the way they did before. However, you can edit the rules for the program to use a selection instead.

# Update Only Addresses with NCOA Changes

Previously, AddressFinder update options did not allow you to only update addresses that had been changed by the AddressFinder process, so you had to either update only forwardable addresses or all addresses. You can now use the new **Update only NCOA changes** option, which allows you to only update addresses that have been changed by the process.

You access this screen from the Data Tune-Up page from *Administration*. For the AddressFinder process you want to edit, under **Step 3**, click **Edit Properties**.

# Sustained Giving

In ***Blackbaud CRM 4.0***, we introduced significant enhancements to help you effectively manage and strategically grow your sustained or recurring giving programs.

In Service Pack 1, we enhanced the following areas to further define the features we initially introduced.

- Amendments for Recurring Gifts
- Payment Methods for Recurring Gifts
- Skipped Installments for Recurring Gifts

# Amendments for Recurring Gifts

In ***Blackbaud CRM 4.0***, we introduced amendments on the Activity tab of a recurring gift record. Under **Activity**, most amendments associated with a recurring gift appear and are sorted by the most recent event. Amendments represent any manual or global process change to the properties of a recurring gift. For example, when you edit the payment method of a recurring gift or change the recurring gift's status, these actions are recorded as amendments on the activity timeline.

In Service Pack 1, for recurring gifts with a payment method of "Direct debit - pay installments automatically" the **Mandate** field is now captured. This field only appears when a European (SEPA) banking system is enabled and the currency is set to Euros. This change is captured when you edit the field on the Edit payment method details screen of a recurring gift, and through an Enhanced Revenue Batch and Revenue Update Batch.

# Payment Methods for Recurring Gifts

In Service Pack 1, we added "Cash" and "Check" as **Payment method** field options on a recurring gift record. By selecting either option, you can track the number of recurring gifts associated with a cash or check payment method in a given time period. This may be useful in reports or for general reference.

"Cash" and "Check" now appear as **Payment method** field options and are reflected in the following locations:

- Under **Payment information** on the Add a recurring gift screen.

- Edit payment method details screen for a recurring gift.

- Transaction summary section for a recurring gift record.

- **Update recurring gift statuses** business process.

- Amendment details on the Activity tab of a recurring gift.
- Revenue queries.
- Revenue Update Batch, Enhanced Revenue Batch, and Sponsor Batch.
- Add, transfer, and reassign sponsorship screens as well as the Add a recurring additional gift screen.

# Skip Recurring Gift Installments

In Service Pack 1, we made changes to the behavior of skipped installments. From the Activity tab of a recurring gift record, you can now skip any expected installment in the following scenarios:

- The installment date is no more than five days prior to the current date.
- No payments or write-offs have been applied to the installment.
- No payments have been applied to any installment after the one you want to skip.
- There are no skipped installments after the one you want to skip.

# New Social Media Finder Service for WealthPoint

To help you find and track social media accounts for your prospects, we added a new data service to *WealthPoint*. *PeopleGraph*, a Dun & Bradstreet company, uses email address information from your constituent records to find social media data in Blackbaud's Social Media Finder service.

## Watch how Social Media Finder works in a *WealthPoint* screening

The social media data that returns on a wealth screening is stored on a new Social Summary tab on the wealth and ratings record. On the Social Summary tab, you can track the social media accounts for your prospects and if you have the Social Media Finder subscription, social media accounts, profile images, demographics, and ratings appear here after a *WealthPoint* screening.

***Tip:*** If you are interested in the Social Media Finder add-on subscription, contact your Blackbaud Account Representative or email us at solutions@blackbaud.com.

***Note:*** Target Analytics and our data providers are contractually bound to comply with all local, national, and international legal requirements related to the collection, transfer, and storage of social media information and other constituent data. As an analytics provider of a publically traded company, maintaining compliance with the law is our top priority - we will not offer any solution that we believe puts our clients or shareholders at risk.

# About Social Media Finder

Unlike other data sources in *WealthPoint*, when you perform a *WealthPoint* screening for social media information, you are not returning results from a Target Analytics database. Instead, we're using *PeopleGraph*'s API to search and return results directly from them. Therefore, when *PeopleGraph* updates its database, it will be immediately available to you the next time you perform a WealthPoint screening. While *PeopleGraph* may update the social media services in their database, they currently have over 90 social sources in its search including *Facebook*, *Twitter*, *LinkedIn*, *Flickr*, *Etsy*, *Google+*, *Instagram*, *Pinterest*, *tripadvisor*, *WordPress*, *Vimeo*, *YouTube*, and more.

***Note:*** *PeopleGraph* may add social media sources at any time. If we hear of new services added, we will inform you. Potentially, they may have to adjust or remove some of their social media services due to privacy changes and API restrictions, For example, as a social media service increases in popularity, so does the value of their data as a revenue source. Some services will choose to maintain a very open API, like *Twitter*. However, others can decide to restrict access to data in their API at any time. Keep note of these two possibilities when you screen prospects.

However, just as with wealth data, if prospects do not want their social media information shared, most services enable users to voluntarily implement strict privacy settings. And, users are allowed to change their privacy settings at any time so your results may change based on user preferences.

# How Social Media Finder Works

Blackbaud's Social Media Finder returns data on a *WealthPoint* screening only. With or without the Social Media Finder subscription, all records will have a Social Summary tab on the wealth and ratings record. A Social Media Finder subscription is not required to add and maintain social media accounts manually. However, with Social Media Finder, social data that returns from a *WealthPoint* screening lives on the Social Summary tab with the manually entered social media accounts.

During a *WealthPoint* screening, up to 5 email addresses are sent to *PeopleGraph*.

Priority is given to the primary email address on record. The primary email address and the next 4 most recently added email addresses are sent to *PeopleGraph* for their social media search.

***Tip:*** We recommend you verify email addresses before you screen and consider re-screening when you receive a new email address. For example, it can be common for people to have multiple email accounts for different purposes. It is possible that little or no social media accounts may return for your prospect because you may not have the personal email address he or she used as the contact email on the social media service account.

Ultimately, the success of the individual or group wealth screening for social media information depends on the record or records you send to *PeopleGraph*. Consider that older constituents may not have the number of accounts that younger constituents have. Have you been able to verify both personal and professional emails for your constituent? And, do your prospects want to be found on social media?

Those who do return large amounts of data hold even more value over other prospects because they likely have invested much time in developing their online network, influence, and outreach. You should

consider developing a relationship with those who return high ratings and large numbers of accounts because they may be great candidates for furthering the message of your organization.

# Social Media Images

When *PeopleGraph* searches for your prospect, they return up to one social media image per email address. However, because it's an image, *PeopleGraph* can't determine which profile image from a social media account most looks like your prospect. For example, is the picture that returns for a social media account a headshot, group photo, beloved pet, grandchild, or a field of flowers? Instead, *PeopleGraph* picks the best image based on a formula they developed. The formula to decide which image to return for each email address is based on which account they determine most important. Therefore, the social media images that return may not be what you consider most important in the prospect research world.

We recommend you review the images and delete those that are not applicable. However, just like other data from *WealthPoint*, it can return on your next wealth screening. If there is an image that captures the prospect well, you can easily use the image as your main profile image or save to your computer. When you scroll through the images that return, click **Use as main profile image** to quickly update the constituent's main profile image. The old constituent image deletes and is replaced by the new one from your *WealthPoint* screening.

# Social Media Biography

Based on the data *PeopleGraph* finds, we provide a Social Media Summary for your prospect. To review the information, from the Social Summary tab of a wealth and ratings record, click **Review details**.

The information for the social media biography summary fields are based upon the social media accounts returned by *PeopleGraph*. If the location, occupation, company, name, or gender fields are inaccurate or incomplete, you can update the information. For example, *PeopleGraph* may populate the gender field with "Unknown" based on the social media data it finds, however you likely know and can update that information.

To show you how *PeopleGraph* found the location, occupation, and company, we provide a details section with the information found for each email address sent to *PeopleGraph*.

# Social Media Ratings

The influence and outreach scores are provided by *PeopleGraph* and are based on *Twitter* accounts. If a prospect does not return a *Twitter* account, they will not have ratings. *PeopleGraph* also relies upon the service Kred.com to determine how trusted *Twitter* accounts are, how often the account's content is shared, and how large is the account's network.

The Social Media rating is based on a Target Analytics algorithm. Among other factors, the algorithm does consider the influence rating, outreach rating, and number of social media accounts returned.

For more information about the meaning of the social media, influence, and outreach ratings, review the rating descriptions below.

### Social media rating:

**5 – Social Influencer**: Individuals who are very heavy social users, and often share content. They have large followings, which gives them major influence when they interact with others. They are normally very involved on *Twitter* and *Facebook*, with multiple posts per day. Most importantly, their content is frequently re-shared by others. Individuals and companies will target influencers directly because of their large networks. They hope the influencers can help spread their message.

**4 – Content Cultivator**: Heavy social users who are very active, but do not carry the network size or have the impact of a true influencer. While they have less impact than the influencer, they can be very helpful to nonprofits because they habitually share content. These individuals are great to connect with because they increase the chances of your message reaching a large audience.

**3 – Socially Connected**: Individuals in this segment have a presence on all three major networks, *Facebook*, *LinkedIn*, and *Twitter*. Also, they often use other platforms (ex. *Pinterest* and *Instagram*) but interact with a smaller social circle than influencers or cultivators. They are less likely to share content, or shift people's point of view with their opinions. They use social often, but more for entertainment and family interactions.

**2 – Multi-Networker**: Individuals who are socially-savvy enough to have a presence on several platforms, but are largely passive users. They log into *Facebook* several times a week to change their status, and sometimes have *LinkedIn* or *Twitter* accounts. However, social media is a small part of their lives. Because they aren't as engaged, they are not as exposed to content they may relate to and as a result, share with others infrequently.

**1 – Social Starter**: Individuals who typically have only one social media account. They also aren't heavy users and have very little influence. Most often they use only *Facebook*, and on average are older than the mainstream social media user. They are only engaged on the network because their peers or family members are, and they log in occasionally to see "what's going on."

**0 – Unconnected**: We were unable to find social media accounts linked to the prospect's email address.

### Influence rating:

The influence rating is based on how likely others are to retweet or share that individual's social media posts with their networks. The higher the influence rating the better. Those whose content gets shared regularly help shape other people's opinions. Anything above 700 is considered excellent.

### Outreach rating:

The outreach rating ranks how likely a user is to comment on or share content on *Facebook* and retweet others' social media posts within his or her network on *Twitter*. A good score means the person is a "sharer," and someone that may help spread your message. A score of seven or higher is considered excellent.

## Social Media Accounts

The social media accounts are a combination of manually entered accounts and the ones that return from *PeopleGraph*.

***Note:*** If you add a social media account through the constituent record Contact tab, it is automatically added to the wealth and ratings record Social Summary tab, and vice versa.

When you periodically screen prospects with *WealthPoint*, new information can return, especially if you were able to send a new email address. However, before you screen, you can choose to **Delete social summary**. All data that *PeopleGraph* returns, including social media images, social media biography, social media ratings, and social media accounts, will delete. Then, when you wealth screen, it is possible to return less or different accounts than the last time you screened. There are three main reasons this can occur:

1. Did the email addresses change since the last time you wealth screened the prospect?
2. The prospect could have changed his or her privacy settings for the social media service.
3. The social media service could have changed its privacy settings and terms for its API, and therefore restricted *PeopleGraph*'s ability to locate records based on email address.

# Helpful Tips for Social Media Accounts

- Only manually added and confirmed social media accounts appear as icons below the profile picture on the wealth and ratings record or on the contact information tile of a constituent record.
- The links in the list are clickable. For example, click a social media service link in the **URL** column to open the social media account in a new browser tab.

  ***Tip:*** Facebook and other account links work better if you log in to the social media service first. We recommend you log in to *Facebook* before you click social media icons or URLs on a wealth and ratings record.

- When you delete a social media account that returned from a wealth screening, it operates the same as other wealth data that returns. It removes the information temporarily, but it can return on the next WealthPoint screening.
- To confirm the social media account is your prospect's, use the URL and match code description to determine if the data from *PeopleGraph* is accurate.
- To remove the confirmed or rejected status from a social media account, click the double arrows for the record's row in the list and click **Clear status**.
- Even when you subscribe to Social Media Finder, you may need to add an account manually from time to time. For example, if you do not know the email address for a prospect but a basic Google search of the person based on name and geography returns an account, you will want to

track this on the wealth and ratings record.

- For social media accounts that return from a WealthPoint screening, we automatically add new social media services (including the icon) for you to the Social Media Services page in *Constituents*, **Configuration**.

## Social Media Data Recommendations

While social media is a quickly evolving yet newer field of data, there is much to be done with the data that does return. Use these ideas for how to leverage social media information to the benefit of your organization.

1. Use social media accounts to verify information about your prospect including occupation, employer, interests, and affiliations.
2. Use social media to identify your most important content cultivators and influencers. Not only can you search for prospects who have the capacity to donate to your organization but you can identify people who can use their great influence on social media to promote your cause. For example, have you heard that your organization is planning an important event? You may want to consider researching and providing your event coordinators a list of those with great social media influence so they can invite them to the event. Well connected individuals can help promote the event and increase awareness.
3. Use social media to confirm relationships and connections. Can you identify someone at your organization (donor, employee, trustee) that already has an established relationship with the new prospect? Social media can help you determine if there's someone who can give your fundraisers the edge with a personal introduction.
4. Which social media services should you invest your time developing a strong message and network for your organization? Base your decision on the most popular social media accounts that return for your constituents. If most of your constituents are on *Twitter*, *LinkedIn*, or *Facebook*, develop your accounts there and then perhaps consider whether you can finally close your *Myspace* or *Google+* account.
5. Provide fundraisers the key social media accounts that can help them to get to know and connect with prospects.
6. Create a constituent query and filter records by social media service. For example, you can create a filtered list of just prospects with a *Twitter* account and provide it to the person in your organization who's in charge of updating and growing your organization's social media accounts. A list of constituents who care about your organization and a link to their related account can grow your network and influence much more quickly than organic, word of mouth growth.

# CoreLogic Property Valuation Update

For better property valuation estimates, Target Analytics has improved our algorithm for the property value model. This change enables us to consider additional property estimates in the property valuation formula.

CoreLogic property data can be found on the constituent's wealth and ratings record, Assets tab, under the Real estate section.

# Additional Target Analytics Data Updates

In January 2015, we updated NOZA, FEC, Dun & Bradstreet, and CoreLogic data used in WealthPoint.

***Note:*** With the CoreLogic data update, we saw a greater population of total market value in Indiana property records.

- NOZA: The world's largest database of public charitable donations. This information is stored on the constituent's wealth and ratings record, Giving tab, under Philanthropic gifts. For each donation, a gift range, organization donated to, organization category, gift year, and name on the gift returns. You can use the web address or source material to help you confirm the data belongs to your prospect.

  Every month, we add at least one million new gifts that can be searched.
- FEC: Federal Elections Commission data, from the Internal Revenue Service, contains information on election and political campaign contributions to identify political affiliations and business giving to PACs and political campaigns. This information includes the amount of the contribution, the recipient, and the date. This information is stored on constituent's wealth and ratings record, Giving tab, under the Political donations section.
- Dun & Bradstreet: The world's leading source of commercial information and insight on businesses to identify business ownership, equity, and leadership positions in public and private companies. Also, they provide you with data about the constituent's employment. This information is stored on the constituent's wealth and ratings record, Assets tab, under Businesses section.
- CoreLogic: Tracks the constituent's real estate holdings including real estate valuation estimates. Identifies properties owned for a deed, parcel, and mortgage. This information is stored on the constituent's wealth and ratings record, Assets tab, under the Real estate section.

# New Queries from the Blackbaud Data Warehouse

We have added two new query source views from the Blackbaud Data Warehouse: "Revenue (from the Blackbaud Data Warehouse)" and "Revenue Recognition Credits (from the Blackbaud Data Warehouse)."

These queries are similar to their counterpart queries from the transactional database. The queries from the data warehouse only include fields available in the warehouse, and they only show results as of the last time the ETL process was run. You can see when the data was last updated on the Preview results tab of the New Ad-hoc Query screen or the Edit Ad-hoc Query screen. You can also see the last updated date on the Results page when you run the query.

# Blackbaud Data Warehouse Reconciliation Report

We have added a Blackbaud Data Warehouse reconciliation report to help you compare summary information about your transactional database and your Blackbaud Data Warehouse.

You can access the new Reconciliation report tab on the Blackbaud Data Warehouse page.

The report shows you the total number of items by category on your transactional database and on the data warehouse. Where the total counts match, you see a checkmark on the Reconciled column. Any exceptions are listed at the bottom of the report.

To take advantage of this fix, you must redeploy the Blackbaud Data Warehouse and complete an incremental refresh.

# Service Pack 2

These features were introduced in Service Pack 2 after the original ***CRM 4.0*** release.

## Database Growth Management

We have added a new database analysis tool that allows you to view the size of your database and the space taken by different types of data. The Database Growth Management page provides insight and tools related to business process history, audit tables, application data, selection data, and customization data.

To access the new Database Growth Management page, from *Administration*, click **Database growth management** under **Administration**. Use the tabs to navigate detailed information about each data type in your database.

***Note:*** When you first view this page, you will not see any data because the process has not run yet. By default, the process runs weekly, or you can manually run it anytime by clicking **Refresh now**.

- In the Summary tab, you can see the overall size of your database and the distribution of data by type and how data size has changed over time. Here, you can also see when the information was last updated and refresh it manually.
- In the Business Process History tab you see the amount of data generated by business processes. When you run a business process such as an export in ***Blackbaud CRM***, the program stores a copy of the output. To regularly delete these outputs when you no longer need them, you can use the "Business process output delete" global change. ***Blackbaud CRM*** also keeps copies of batch output, which you can delete using the Batch report delete global change.
- The Audit Tables tab shows the amount of data used by audit tables. Audit tables keep details of changes made to the database by different users. You can use the "Delete audit data" global change to delete old audit table information you no longer want to keep.
- The Application Data tab itemizes the data that you enter into ***Blackbaud CRM***, including records, attributes you created, data related to marketing efforts, and smart field calculations.
- In the Selection Data tab, you see the data taken up by selections, whether created by users, imported into the database, or generic selections that were created by other elements of the system.
- In the Customization Data tab, you can see information about custom tables you created using the ***Blackbaud CRM*** SDK.
- In the Other Data tab, you see the total amount of data that does not fall into any of the previous categories. This is usually minimal, but can show data from tables you created outside of the ***Blackbaud CRM*** SDK.

The data included in this tool is updated weekly and the last refresh time is posted on the Summary tab. To refresh the data outside of the automatic refresh process, click **Refresh now** on the Summary tab. The program indicates an estimated time required for the refresh to let you decide if you want to wait or refresh at another time.

As part of this work, we have also added a new option to the "Business process output delete" global change. You can now choose whether you want to delete all output older than a certain timeframe or all output except a certain number of the most recent runs. Previously, you could only use the first option.

To use the new option, on the Add global change screen for the "Business process output delete" global change, click **Delete output tables for all but the most recent** and enter the number of runs you want to save.

***Note:*** Deleting business process output does not affect your ability to view business process history. You can still see the full history of business processes even when the output for those processes has been deleted.

To access global changes, from *Administration*, click **Global changes** under **Data**.

To learn more about the new Database Growth Management tool, see the new Database Growth Management Guide.

# Pledge Installment Improvements

With this release, we improved functionality for pledge installments to improve quality, and increase reliability, accuracy, and consistency.

These improvements ensure accurate and consistent behavior when adding or editing a pledge through a record, Enhanced Revenue Batch, or Revenue Update Batch in the following fields:

- The value in the **Installment amount** field consistently reflects the most recent amount entered.
- The values in the **Installment amount**, **No. installments**, and **No. installments remaining** fields are accurately calculated in the pledge installment grid.

- The **No. installments** and **No. installments remaining** fields represent the number of installments that are not fully paid.
- When you edit installment designations and enter different installment values, the value in the **Installment amount** field consistently represents the earliest installment amount that is not fully paid.

***Tip:*** While the **No. installments** and **No. installments remaining** fields are labeled differently, both fields behave the same way throughout the program. For example, the **No. installments** field displays on the Add a pledge screen and represents the number of installments for a new pledge. The **No. installments remaining** field displays on the Edit pledge screen and represents the number of remaining installments for an existing pledge.

# Sustained Giving

In ***Blackbaud CRM 4.0*** and Service Pack 1, we introduced significant enhancements to help you effectively manage and strategically grow your sustained or recurring giving programs.

In Service Pack 2, we made further changes to the recurring gift area. With this release, you can now work with several payment handling options for recurring gifts. With these options, you can specify how the program handles payments when more than one past installment has a balance, payments you receive that overpay or underpay installment balances, as well as balances still present on past installment after applying a payment. Previously, you could only select to update installment amounts to match an incoming payment or maintain installment amounts. These new options offer more flexibility and accuracy for handling payments.

The payment handling feature affects the following areas of the program.

## Recurring Gift Payment Handling

With this release, on the Revenue page, we replaced the **Recurring gift settings** configuration option with the new **Recurring gift payment handling** option.

Previously, the **Recurring gift settings** configuration option existed and offered two choices: "Update installment amounts to match payments" and "Maintain installment amounts." With this release, the **Recurring gift payment handling** configuration option replaces the **Recurring gift settings** configuration option and offers much more flexibility when applying payments.

Click **Recurring gift payment handling** to access the Recurring gift payment handling screen.

With these new configuration options, you can specify how the program handles payments when more than one past installment has a balance, payments you receive that overpay or underpay installment balances, as well as balances still present on past installments after applying a payment.

***Note:*** Note that installments with today's date are included as "past installments" for the purposes of payment handling.

# Add and Edit a Recurring Gift Payment

To ensure consistency across the product with the new payment handling options, we made several changes to the Add a payment and Edit a payment screens.

- When applying an amount to a recurring gift, on the Amount to apply screen, the **Next transaction amount** option now displays as **Next installment balance**. The **Past due amount** option now displays as **Past installment balance**.

- From the Amount to apply screen, note that **Past installment balance** is calculated based on the installment date. The calculation includes an installment balance that is due today or in the past. Previously, in version 4.0, this option was based on the installment status.
- Based on payment handling configuration options, donations created from overpaying an installment are automatically added in the application grid. A new donation is also created if you increase the amount in the **Applied** field.

> ***Tip:*** Donations created from payment handling configuration options also affect recurring gift payments added through Enhanced Revenue Batch and Revenue Update Batch.

When you edit a recurring gift payment, it is important to note the following behavior:

- When you edit a recurring gift payment, the payment handling configuration options that existed when you initially added the payment will apply to future edits of the payment. Note that if you added a payment prior to version 4.4, the options in place prior to the upgrade will apply to all future edits of the payment.
- Payment handling configuration options consider future and past installments in terms of the recurring gift payment date, not the date the recurring gift is edited.

  Consider the following scenario as an example:

  **On 02/05/2015 -**

  a. A recurring gift has two installments due on 01/01/2015 and 02/01/2015 for $5 each.

  b. The payment handling options are set to apply the payment to any past installments with a balance, and create a donation for any excess after that.

c. A payment of $10 is applied to the recurring gift which pays the installments for 01/01/2015 and 02/01/2015.

**On 03/05/2015** -

a. An installment is now due on 03/01/2015 for $5.

b. The payment that was added on 02/05/2015 is increased to apply $15 to the recurring gift.

c. The additional $5 will be split off as a donation. The 03/01/2015 installment is treated as a future installment during this edit because it was considered a future installment at the time the payment was originally added.

# Recurring Gift Activity Timeline

On a recurring gift record, the **Details** column of the Activity timeline now displays payment handling adjustment details for installments.

For example, when an installment is underpaid, and the payment handling option is set to apply the payment and automatically write-off the remaining installment balance, "Recurring gift payment handling" displays in the **Details** column.

***Warning:*** When a recurring gift payment is deleted, all associated write-offs and adjustments are deleted as well.

# Next Installment Date Calculation

When you specify recurring gift payment handling configuration options, you can select to either apply a payment to the oldest or most recent installment with a balance.

Based on your selection, the program calculates whether to apply payments to the oldest or most recent installment. Once this is calculated, the "next" installment to be paid is defined and reflected in the following areas of the program:

- Recurring gift transaction summary section
- Amount and date due on the Add a payment and Edit a payment screens
- Amount and date due in Enhanced Revenue Batch and Revenue Update Batch

- Installments associated with credit card and direct debit events, such as credit card processing and automatically generating payments
- Recurring gift next transaction date in *Query*
- Pledge reminders

# Existing Recurring Gift Settings

Previously, the **Recurring gift settings** configuration option existed and offered two choices: "Update installment amounts to match payments" and "Maintain installment amounts." With this release, the **Recurring gift payment handling** configuration option replaces the **Recurring gift settings** configuration option and offers much more flexibility when applying payments.

When you upgrade to version 4.0 Service Pack 2, you must decide how you want the program to handle payments toward recurring gift installments. The following details explain how the previous option relates to the new payment handling option.

## Update Installment Amounts to Match Payments

In the previous version, when you selected "Update installment amounts to match payments," the installment balance that was due increased to match the payment received. No underpaid installment balance or future installment was affected by the overpayment.

To ensure the equivalent behavior is applied to payments using the new **Recurring gift payment handling** option, select the following options on the Recurring gift payment handling screen:

- To handle payments when more than one past installment has a balance, select **Apply the payment to the oldest installment with a balance**.
- To handle payments that overpay the installment balance:
  a. Select **Do not apply the excess amount to other past installments with a balance**.
  b. Select **Increase the installment amount to include excess payment amount (other installment amounts are unaffected)**.
- To handle payments that underpay the installment balance, select **Decrease the installment amount to match the payment amount (other installment amounts are unaffected**).
- To handle remaining past installment balances after fulling applying a payment, select **Leave any balances**.

## Maintain installment amounts

In the previous version, when you selected "Maintain installment amounts," the payment was applied toward the installment balances that were due and any overpayment amount was applied toward a later installment.

To ensure the equivalent behavior is applied to payments using the new **Recurring gift payment handling** option, select the following options on the Recurring gift payment handling screen:

- To handle payments when more than one past installment has a balance, select **Apply the payment to the oldest installment with a balance**.
- To handle payments that overpay the installment balance:
  a. Select **First, apply the excess amount to any other past installments with a balance (from oldest to most recent)**.
  b. Select **Apply any remaining excess to future installments**.
- To handle payments that underpay the past installment balance, select **Apply the payment and leave a balance for the installment**.
- To handle remaining past installment balances after fulling applying a payment, select **Leave any balances**.

# Opportunities Tile on Constituent Records

The constituent record now includes the Opportunities tile, which summarizes opportunity information for individual constituents who are major giving prospects. You can add and edit a constituent's opportunity information from the tile, including the opportunity's plan, the plan's primary manager, and other information about the opportunity.

To add opportunities from the Opportunities tile, click **Add**. To edit opportunity information, click **Edit** next to the plan, primary manager, or the amount of the opportunity. If a constituent has more than one opportunity, you can use the arrows on the Opportunity tile to view each opportunity.

The amount that appears in the tile depends on the status of the opportunity. For example, if the opportunity status is qualified, response pending, rejected, or canceled, the tile displays the ask amount. If the opportunity is unqualified, the tile displays the expected ask amount. If the opportunity is accepted, the tile displays the accepted amount.

To open the related record, click the name of the plan, the name of the primary manager, or the opportunity amount.

To open the Opportunities tab of the plan the Opportunities tile is displaying, click the tile name.

# Expand and Collapse Query Folders

To help you better sort through and find your queries, we have added the ability to expand all or collapse all query folders in the Information Library.

On the Query tab of the Information Library, you can now click **Expand all** and **Collapse all** to easily view your folders and subfolders .

When you collapse all, only first-level folders are displayed. When you expand all, you see all your query folders and subfolders.

To access your queries, from *Analysis*, click **Information library**.

# Customize KPI Dashboard

You can now customize your KPI dashboard. From the dashboard, click **Customize dashboard** under **Tasks**.

The new Customize a KPI dashboard screen appears. You can create pages and tabs within pages to organize your KPIs. To add pages or tabs, click the plus sign next to the **Page** or **Tab** fields. You can edit existing pages and tab names by clicking the pencil icon, or delete them by clicking the red X icon.

You can also reorganize tabs within a page. To do this, click the engine icon next to the **Tab** field. On the Reorder SKPI Dashboard tabs screen, use the up and down arrows to rearrange tabs and click **OK** to save the new order.

Once you have created pages and tabs, to assign KPIs to them, select the KPI and click the right arrow to add it, or the left arrow to remove it from a page or a tab.

To access your KPI dashboard, from *Analysis*, click **KPI dashboard**.

# Performance Improvements for Group WealthPoint Screenings

To improve the performance when users screen a group of constituents through WealthPoint, Target Analytics is making the following updates.

Going forward, we will focus on returning the key relationships from GuideStar on a group screening:

- Known relationships (both people have been screened through WealthPoint and have a connection through a nonprofit found in GuideStar), regardless of form year

  **and**

- A representative sample of the other relationships from the most recent years

For some nonprofit connections, we've seen the total number of relationships returned could be up to 20,000. For you to sort through 20,000 relationships and get the most pertinent information is

unrealistic. Therefore, we have simplified the process. These initial results will then help you determine if it is worth the effort to review the additional relationships. And, we want to ensure that you have the choice when to return thousands of relationships for a constituent. If a user does want to see all the relationships, individual WealthPoint screenings will continue to return all relationships.

Also, we added an indicator on the wealth and ratings record for constituents who have more network connections available from GuideStar. This indicator plus the initial information returned can help you decide if you want to run an individual WealthPoint screening. In addition, the known relationships will display at the top of the network connections list.

With these changes we can improve your WealthPoint group screenings without sacrificing the ability to see all relationships for a constituent. We hope these performance updates will improve your experience group screening constituents in WealthPoint.

# Invitation Lists

To make it easier to sort an invitation list on a special event record in alphabetical order, invitee names are now formatted as "Last name, First name."

# Blackbaud Internet Solutions

## Security Update

As part of our normal product improvement processes, we review our security measures, protocols, and infrastructure on an ongoing basis. ***Blackbaud Internet Solutions*** was automatically updated in this release to include security improvements which address vulnerabilities that could potentially compromise the integrity of our product.

# Help Text in Email Messages

New help text is available for the **Send after** date field in *Messages* to explain that after you click **Send final**, the website does not process the email until the date and time you enter in the field. It also explains that if you delete the email before that date, the program does not process it and does not send it to recipients.

# Pages: Additional Copy Part Option

You can now copy parts from the Page content tab when you highlight a page in the list of pages. This change reduces the number of clicks required to copy parts when you navigate to them from the list of pages. Previously, you had to edit the pages to copy them or copy them from *Parts*.

# Part Search Filters

To help you quickly find the pages and parts you need, new search filters are available. From the Search tab, you can use the new **My content** or **Filter by template** options to narrow the results to pages you created or that use a specific template.

Also, when you search for parts to insert on pages, the **My content** filter is available so you can limit the list to the parts you created.

# Pages & Templates New Sort Options

You can now use **Page name** or the new **Last modified** column to sort the list of pages. These changes help you to quickly find the pages you need.

***Note:*** When you sort the list, the pages appear in ascending order. Pages that begin with the letter A, or include the oldest changes, appear at the top of the list.

# Parts Search Filter

To help you quickly find the parts you need, a new search filter is available. From the Search tab, you can use the new **My content** option to narrow the results to parts that you created.

# Profile Update Form

When you design the Profile Update Form for your ***Blackbaud Internet Solutions*** website, the **Email addresses** element under **Contact information** has changed. To improve email address privacy for website users, the new **Make my primary email address private** checkbox appears in the design area when you add the element to a form.

To display the checkbox on your web page so users can select whether to mark the primary email address as private, select "Yes" in the **Privacy enabled** row on the **Properties** pane. In the **Privacy caption** row, you can enter custom text for the checkbox to display on the page.

***Note:*** When users select the new **Make my primary email address private** checkbox on your web page, it also designates their primary email address as private for the Directory and Profile Display parts on a web page.

# reCAPTCHA Instructional Text

New instructional text appears on forms that include reCAPTCHA images. Previously, the text instructed users to "type the two words" shown in the reCAPTCHA image. Now, the text instructs them to "enter the text" since the images typically include characters that do not form words.

# Site Administrators Filter for Users

Now when you use filters in *Users*, you can identify the people who are site administrators. Previously, you could only filter by the roles you added to your website. This change helps you quickly identify people with administrative access when you need to change rights, such as when a person is no longer employed by your organization.

# Relationship Label for Additional Members in Membership Dues Batches

When a program level allows multiple members, the drop down under **Who else should be included on this membership** now includes relationship information. This helps you easily find the relationship between an additional member and a primary member on the Enter Membership Dues page. For example, when you add the spouse of a constituent as an additional member, "(Spouse)" appears as the relation next to their name in the **Name (Relation)** column. Also, the **Relationship** column on the Members and cards screen has been removed and the relationship information now appears in the **Name (Relation)** column.

# Service Pack 3

These features were introduced in Service Pack 3 after the original ***CRM 4.0*** release.

# Block Sending Email Messages and Scheduled Email

Your System Administrator can now use the BlockAllEmails and BlockScheduledEmails settings to prevent inadvertently sending email messages and scheduled email from a test environment. To do

this, you must add <add key="BlockAllEmails" value="True" /> and <add key="BlockScheduledEmails" value="True" /> to the appSetting node in both web.config files for ***Blackbaud Internet Solutions*** and ***Blackbaud CRM***. By default these settings do not appear in the file, and the default behavior is False.

***Tip:*** The BlockScheduledEmails setting *only* blocks emails sent from the *Email*, *Scheduled emails* functional area. It does not block scheduled emails set to send when you use the **Send after date** field in *Messages* or *Marketing Efforts*.

***Note:*** With this change, the ProcessCMSEmail.BusinessProcess.vb file has been updated for the Process CMS Email Business Process in ***Blackbaud CRM***.

# Prospect Status Tile on Constituent Records

The constituent record now includes the Prospect Status Tile, which summarizes information for major giving prospects. You can view and edit a constituent's prospect information from the tile, including the prospect status and the prospect manager. From the Prospect Status Tile, you can also flag the prospect for tracking purposes.

# Pending Activity List Builder

To improve flexibility in managing pending activity information, the Pending Activity data list has been converted to list builder format to include more advanced options for sorting, navigating, and customizing information. You can access the Pending Activity list by clicking on the Pending Activity second-tier tab on the Fundraiser tab of the constituent record or by clicking the Pending Activity tab on the My Fundraiser page. For more information about list builder options, see the *General Features Guide*.

**Show me:** Watch this video to learn how to opt into the Pending Activity list builder

To opt into the Pending Activity list builder,you will need to turn on Design Mode by clicking **Toggle design mode on** while on the Fundraiser tab on the Constituent record or on the My Fundraiser page. Click **Edit Tabs** to edit the appearance of the Pending Activity second-tier tab and scroll down to

Fundraiser to select the Pending Activity tab. In the **Section** field on the Tab properties screen, click the ellipsis button.

- To turn off the data list, select the data list in the Items grid, and click **Edit**. On the Edit sections screen, click the ellipsis button in the **Visible** field and select **False**.
- To turn on list builder format, select the Pending Activity list builder on the Edit sections screen, click the ellipsis button in the **Visible** field and select **True**.

# Service Pack 4

These features were introduced in Service Pack 4 after the original ***CRM 4.0*** release.

## Blackbaud Internet Solutions Middle Name Field

The Donation Form, Payment, and Payment 2.0 parts in ***Blackbaud Internet Solutions*** now include the **Middle name** field under **Additional fields**.

***Note:*** This change satisfies the Canadian Revenue Agency's requirements for donation receipts.

## BBIS Event Registration Transaction Batch: Donor Option

When a website user submits an event registration on your ***Blackbaud Internet Solutions*** website and you process it in the BBIS Event Registration Transaction Batch in ***Blackbaud CRM***, you can now select "Donor" in the **Registrant** column on the Guests tab when you view transaction details. Select this option when the donor submits their information as a guest instead of the primary registrant

You can also change the registrant from Donor to Linked constituent, New constituent, or Unknown guest.

***Tip:*** Previously, you could select “Donor” in the ClickOnce version of ***Blackbaud CRM***.

# PeopleFinder Phone Number Enhancements

We have added some address-related enhancements to *PeopleFinder* to help fix an issue with new addresses for constituents found by the *PeopleFinder* process. Previously, if the constituent already had an address in ***CRM*** marked as "Primary" and *PeopleFinder* returned a new address for the constituent, the primary address in ***CRM*** was no longer marked as primary and the address type was set to "PeopleFinder-former." The new address from *PeopleFinder* was added to the constituent and was marked as "Primary."

In order to offer more flexibility, we have added some additional options to the Edit PeopleFinder process options screen. On this screen, you can now choose whether or not to add new addresses from *PeopleFinder* to constituents at all. If you do, you can select the address type and information source to use for the new addresses. You can also choose the address type to use for the former primary addresses for constituents. In addition, you can choose whether or not to make the new addresses from *PeopleFinder* the primary ones.

In order to support these changes, the PEOPLEFINDER process table in the ***CRM*** database has been updated with these additional columns: UPDATEADDRESS, OLDADDRESSTYPECODEID, NEWADDRESSTYPECODEID, NEWADDRESSINFOSOURCECODEID, and MARKADDRESSASPRIMARY. Existing *PeopleFinder* processes will remain unchanged; however, the Edit PeopleFinder process options screen will have the new options. If you want to take advantage of these changes, you can edit the existing *PeopleFinder* process options.

# Constituent Tile SDK Enhancements

With the ***CRM 4.0*** release, we introduced constituent summary tiles (**Constituent Tiles on page 22**) to offer quick views of constituent information such as contact information, relationships, and memberships. With Service Pack 4, we introduce a more streamlined way to create and deploy new constituent tiles. For more information, see the SDK documentation. If you already created custom constituent tiles on version 4.0 prior to Service Pack 4, your customizations will continue to work after you upgrade; however, we recommend you plan to upgrade your custom tiles to take advantage of the streamlined tile development and deployment process.

# Documentation Enhancement: Dependencies on Audit Tables

When the program processes certain features of the program, such as smart fields and reports, it is important to understand that these features may not process correctly when dependent audit tables

are disabled or purged. Specific parameters determine when a feature is dependent on an audit table.

With this release, we enhanced the audit table content to more clearly identify audit tables with dependent fields. We now provide a list of fields that depend on audit tables for the following areas of the program:

- Smart Fields
- Constituents
- Revenue
- Marketing and Communications

To learn more about these audit table enhancements, see the Security Guide.

# Service Pack 5

These features were introduced in Service Pack 5 after the original ***CRM 4.0*** release.

## Microsoft .NET Framework 4.5.2

With this release, ***Blackbaud CRM*** version 4.0 Service Pack 5 now requires .NET 4.5.2 to support the Transport Layer Security (TLS) 1.2 protocol for enhanced communication security over the Internet. Before you upgrade, you must upgrade all servers that run any component of ***Blackbaud CRM*** (such as database and web servers) to .NET 4.5.2. If you have any customizations, they will continue to work after the upgrade. However, if you edit a customization (or create a new one), you must update the target framework in the project properties to use .NET 4.5.2 before you recompile the customization. For more information, see the SDK new features information.

## Delete Email Messages and Newsletter Issues Permanently

***Note:*** With the 4.0 Service Pack 8 release, a new **Automatically delete email older than** option appears on this setting for you to delete messages and newsletters based on whether the email is beyond a certain number of days, months, or years. For more information about this feature, refer to **Delete Email Messages and Newsletter Issues Permanently**.

To improve performance and delete email messages and newsletter issues in bulk, you can now run a process to permanently delete these from your database. In *Email*, when you delete an email message or newsletter issue, it only soft deletes. When you soft delete email, it removes from the user interface, but the data remains in the database. To delete this email permanently from the database, schedule the new **Delete email permanently** organization setting in *Administration*.

To schedule the frequency and other options for the process, navigate to the setting under **Schedules**.

Under **Frequency**, you schedule a day and time frequency to run the process to permanently delete email messages and newsletter issues in the **Every [ ] day(s) at [ ]:[ ][ ]** fields.

***Tip:*** To prevent the program from running this process, select **Never**. By default, this is selected when you upgrade to this version.

Under **Options**, you enter the number of minutes to allow the process to run and you also enter the number of days to retain soft deleted email messages and newsletter issues in your database so that the remainder of your soft deleted email deletes permanently during the process.

## Important Tips

- To prevent the possibility of anyone scheduling the **Delete email permanently** setting, your System Administrator can use the ShowEmailDelete web.config setting to remove it from the Schedules tab. By default, the setting is <add key="ShowEmailDelete" value="True"/>. To remove it from the tab, enter False.
- To run the process as efficiently as possible, we recommend you schedule it to run after hours when users are less likely to access Blackbaud Internet Solutions and Blackbaud CRM.

  ***Note:*** If you schedule this process and the **Email jobs** process to run at the same time, please be aware your email job process may experience a delay.

- Depending on the volume of email you need to permanently delete, the process can exceed the amount of time you enter in this field. When this occurs, the process pauses and starts again according to the interval you scheduled in the **Every [ ] day(s) at [ ]:[ ][ ]** fields.

  For example, you need to run this process for the first time. Due to the high volume of email to initially delete, you can schedule it to run every night (1 day) at 1 AM for 300 minutes (5 hours). The process runs longer than 300 minutes so it pauses until the next night at 1 AM. At that time, it starts again for the next 300 minutes.

- To determine the email that remains soft deleted and the email that deletes permanently, the program compares the sent date of the email to the number you enter in the **Delete email that is older than [ ] day(s)** field. It is important to consider this as you determine the number of days to enter in this field.

  For example, today's date is March 15 and you enter "90" in this field. Email that was sent on January 15 remains soft deleted in your database. However, email that was sent on November 15 deletes permanently.

## Email Updates in Blackbaud CRM

To learn more about changes in Blackbaud CRM after you permanently delete email messages and newsletter issues, review this section.

- **Constituent Record** - Before you permanently delete email using this process, email messages and newsletter issues on a constituent record in Blackbaud CRM appear with a link beside the **Subject** field. You can click this link to open the message in Blackbaud Internet Solutions. After you run this process, the link disables beside the **Subject** field because you can no longer open it in Blackbaud Internet Solutions. Also, if a recipient opens an email after it has been deleted permanently, submits a donation from one, or clicks links in it, the **Opened**, **Donated**, and **Links clicked** fields do not update to reflect this information. The data that appeared in these fields when it was deleted from your database remains in place. For historical purposes, the other data, such as **Email name** and **Date sent**, also remain on the constituent record.

  In Blackbaud CRM, email message and newsletter issue information displays on the Communications second-tier tab on the Communications tab.

- **Appeal Record** - Blackbaud Internet Solutions email for an appeal appears in the **Blackbaud Internet Solutions emails** grid on the Mailings tab of an appeal record in Blackbaud CRM. After you run this process, the calculations for an email, such as response rate and the number of click throughs, no longer updates. However, the data at the time the email is permanently deleted remains in the grid.

- **CMS Delete Email Business Process** - From *Administration*, *Business processes* in Blackbaud CRM, you can open the CMS Delete Email Business Process to view details about each instance of this process. To do this, on the Business Processes page, select the History tab. In the **Process type** field, select CMS Delete Email Business Process and click **Apply**. The processes appear in the grid below for you to view details such as the status of the process and the date and time the process ended.

  For more information about records and processes in Blackbaud CRM, refer to the Blackbaud CRM help file.

# Advanced Donation Form - Pledge Installments API

When you use the Advanced Donation Form to create a custom donation web page, ***Blackbaud Internet Solutions*** now includes API end points for pledge installments. Pledge installments are the payments a donor makes for a pledge according to a defined time schedule. These end points allow you to capture pledge and installment information, and they also allow you to tokenize a credit card for future pledge installment payments.

***Note:*** The pledge installments API offers additional flexibility, but comes with additional complexity. If you host your own website, we strongly recommend only developers knowledgeable in all areas of customizations design this feature. This includes using endpoints, objects, and the API, as well as writing HTML and JavaScript code. Users without this expertise should not design this page. For information about the API, refer to the Developer Guide. If Blackbaud hosts your website, customizations can only be completed by Blackbaud or one of our designated partners. For more information, please contact your Blackbaud Account Executive.

The following end points are now available.

- payment.Gift.PledgeInstallment.NumberOfInstallments (integer)
- payment.Gift.PledgeInstallment.InstallAmount (number)

Recurrence for these new end points uses these existing end points.

- payment.Gift.Recurrence.Frequency
- payment.Gift.Recurrence. DayOfMonth
- payment.Gift.Recurrence. Month
- payment.Gift.Recurrence. StartDate

Also, two new javascript functions are now available.

- getRecurringGiftInstallmentAmount(totalGiftAmount, numberOfInstallments)

  This calculates the price of each installment for a recurring gift based on the number of installments the website user wants to make.
- getRecurringGiftLastPaymentDate(numberOfInstallments, frequencyCode, installmentStartDate, installmentMonth, installmentDayOfMonth)

  This calculates the end date of a recurring installment based on the number of installments the website user wants to make.

# Service Pack 6

These features were introduced in Service Pack 6 after the original ***CRM 4.0*** release.

## Credit Card Updater Service

Sustained (or recurring) giving is vital to the long-term financial health of your organization. Once you engage valuable sustaining donors, it is critical to keep information about your recurring donors current - from contact details to credit card information.

With Service Pack 6, we introduce ***Blackbaud Merchant Services***™ Credit Card Updater - a subscription service that helps you maintain accurate credit card data for your recurring giving. With Credit Card Updater, you can:

- Avoid declined transactions and disruptions in recurring giving for pledges, recurring gifts, and membership installment plans.
- Reduce time spent contacting donors to update card information.
- Reduce cancellations of recurring gifts.
- Keep donor's credit card information current.
- Save donors' time by proactively receiving updates.

***Note:*** To use Credit Card Updater, you must process credit card payments with ***Blackbaud Merchant Services***.

***Blackbaud Merchant Services*** partners with the following major credit cards to provide Credit Card Updater for ***CRM*** clients:

- Visa® Account Updater
- MasterCard® Automatic Billing Updater
- Discover® Network Account Updater

When your organization subscribes to Credit Card Updater, credit card data for your recurring giving is analyzed each month to identify expired or out-of-date credit card information. Credit Card Updater provides new card numbers and expiration dates when available.

***Warning:*** Credit Card Updater applies only to cards issued by participating United States financial institutions. Credit cards issued by smaller, local banks and credit unions may not update. American Express® cards, as well as cards issued by banks outside of the United States, are not included at this time.

To successfully use Credit Card Updater, your organization must adhere to the following criteria: First, your organization must have an active, United States ***Blackbaud Merchant Services*** account. Second, your ***Blackbaud Payment Services*** account must be associated with a United States or Canadian address. Finally, Credit Card Updater must be enabled. For information about subscribing to Credit Card Updater, contact bbms@blackbaud.com.

Credit Card Updater affects several areas in the program including *Query* and *Revenue*.

# Enable/Disable Credit Card Updater

Once you subscribe to Credit Card Updater from ***Blackbaud Merchant Services***, you must enable it in ***CRM***. Note that your organization must have at least one active, United States ***Blackbaud Merchant Services*** account.

***Warning:*** Credit Card Updater should be enabled *only* in your Production environment. You should not attempt to test in Staging, Development, or other non-Production environments. Credit Card Updater has no test mode as it updates your live credit card data, and is unrelated to your ***Blackbaud Merchant Services*** test mode. Enabling in non-Production environments may cause cards that should register to deregister and vice versa. Ensure that Credit Card Updater is enabled *only* in your Production environment.

After you refresh a non-Production environment, immediately ensure that Credit Card Updater is set to disabled in the refreshed, non-Production environment to prevent the business process from running at night.

To enable Credit Card Updater, from the Blackbaud Payment Service Merchant Accounts page in *Revenue*, click **Enable/Disable Credit Card Updater Service** under **Tasks**.

***Tip:*** Enabling and disabling Credit Card Updater is associated with the same security set as editing the ***Blackbaud Payment Service*** login.

The Enable/disable credit card updater service screen appears where you can select to enable the Service.

- When you select to enable the Service, the "Credit Card Updater" business process is automatically created. This process, which runs nightly, registers and deregisters cards in ***CRM***.
- When updates are made to credit cards associated with pledges, recurring gifts, and membership installment plans, the **Credit Card Updated** field appears on the record and displays the month and year that the card information was updated. You can use the "Credit Card Updates" query to help you track changes made by the Service.
- When you select to disable the Service, the "Credit Card Updater" business process no longer runs nightly. To cancel the Service contract, contact ***Blackbaud Merchant Services*** at bbms@blackbaud.com.

# Credit Card Updater Business Process

When you subscribe to Credit Card Updater, ***Blackbaud Merchant Services*** generates batches of credit card information to analyze for updates each month. If updated credit card information exists, ***Blackbaud Merchant Services*** automatically updates the information in ***CRM*** while original payment details are retained.

After you enable Credit Card Updater from the Blackbaud Payment Service Merchant Accounts page in *Revenue*, the "Credit Card Updater" business process is automatically created and scheduled to run nightly. To view details about processes as they run, from the Business Processes page in *Administration*, click the History tab. From the **Process type** field, filter by "Credit Card Updater Business Process."

***Tip:*** The **Number of records processed** and **Total count** columns represent the number of records processed. These numbers include records updated and not updated by an individual instance of the process.

***Blackbaud Merchant Services*** returns credit card updates once per month in a 10-day window (typically the 10th through 20th of each month). When updates are available and retrieved from ***Blackbaud Merchant Services***, credit card information is updated in ***CRM***. When updates occur, ***Blackbaud Merchant Services*** sends an email to users who elect to receive email notifications through the ***Blackbaud Merchant Services*** web portal.

***Tip:*** In the ***Blackbaud Merchant Services*** web portal, you can set email notifications by clicking **My User Settings**, **Email Notifications**.

To review statuses of business processes as they run, you can subscribe to a Really Simple Syndication (RSS) feed that alerts you when business processes complete or do not finish. To subscribe to the RSS feed, click **More**, **View RSS feed**.

***Warning:*** You cannot edit the business process or add it to a queue for processing.

## What does the business process register?

The business process registers new information for credit cards on file for at least one active, multi-installment revenue commitment paid automatically by a credit card. The following revenue types are included in the business process:

- Recurring gifts with Active, Held, or Lapsed statuses
- Pledges paid in installments with a non-zero balance
- Membership installment plans with a non-zero balance

***Note:*** If you have more than one revenue commitment, such as a pledge or recurring gift, with the same credit card and at least one of them is included in the Credit Card Updater process, all of the revenue records with that credit card will be updated with the updated card information regardless of the status of the commitments. For example, a canceled recurring gift would still receive updated card information if the same card was used on another active revenue commitment. The Credit Card Updater process charges by the number of unique credit cards updated, not by the number of

revenue records that are updated. In this case, your organization is charged for one updated card even though multiple revenue records are updated.

***Warning:*** The initial registration of credit cards may cause the process to run slightly longer.

### What does the business process deregister?

The business process deregisters previously registered credit cards to ensure they are no longer eligible for updates when:

- A credit card is manually updated to remove the existing credit card information and is manually replaced with completely new card information. In this case, the existing card is deregistered and the new card will be eligible for registration in the business process during the next update.
- A recurring gift status changes to Terminated or Canceled.
- A pledge balance changes to zero.
- A membership installment plan balance changes to zero.

***Note:*** For new commitments manually entered through *Batch*, the business process does not consider or process credit card information until the batch is committed.

## Revenue Records

When Credit Card Updater updates pledges, recurring gifts, and membership installment plans, the **Credit Card Updated** field appears and displays the month and year that the credit card information was updated.

For recurring gifts, the field is reflected in the **Transaction summary** section.

For pledges and membership installment plans, the field appears on the Details tab.

When no update is available for a credit card, the **Credit Card Updated** field does not display. To locate revenue records associated with non-updated credit cards, we recommend you run the "Credit Card Updates" query and set the **Status** to equal "Not updated."

***Tip:*** In some cases, you may need to manually update credit card information after the business process runs. For example, a donor calls your organization to provide a new expiration date which

requires you to manually update the card's expiration date in the program. When this occurs, the manual edit you make on the revenue record overrides the last update made by the business process. At this point, the program removes the **Credit Card Updated** field from the revenue record as well as the Credit Card Updates query. The field is added back only when a future update is made by the business process.

## Credit Card Updates Query

We added a new "Credit Card Updates" query to help you track changes made by the Credit Card Updater Service. Use fields such as **Date processed**, **Status**, and **New expiration date** as well as various constituent and revenue fields to review the updates.

***Note:*** When you upgrade to ***Blackbaud CRM 4.0*** Service Pack 6, all system roles with access to the "Credit Card Processing Rejection" query are initially granted access to the new query. This query is visible even when Credit Card Updater Service is disabled.

Query results include details about updated credit cards, as well as previous and new information. When no updates occurred, the status displays "Not updated" and the associated fields are blank.

***Tip:*** To locate revenue records associated with non-updated credit cards, set the **Status** to equal "Not updated."

## Site Security

To ensure that site security works properly for the Credit Card Updates query, you must enable security for the Revenue query. To enable security, from *Administration*, on the Security page, click **Query view security**.

From the **Securable child query views** list, click "Revenue." From the action bar that appears, click **Enable security**.

Once you enable site security for the Revenue query, site security is processed by the **Revenue Commitment** child node in the Credit Card Updates query. Only users with security rights to a site associated with the revenue can view details of the revenue.

***Note:*** Users can view the credit card update record, including date and status, but no other details specific to the revenue appear.

When the query is filtered by any information on the revenue record, such as "Revenue Commitment\Revenue record criteria is not blank," credit card update results linked to that revenue only display when users have rights associated with that revenue.

### Constituent Security

To ensure that constituent security works properly for the Credit Card Updates query, you must enable security for the Constituents query. To enable security, from *Administration*, on the Security page, click **Query view security**.

From the **Securable child query views** list, click "Constituents." From the action bar that appears, click **Enable security**.

Once you enable site security for the Constituents query, site security is processed by the **Constituent** child node in the Credit Card Updates query. Only users with security rights to the constituent associated with the update can view constituent details.

***Note:*** Users can view the credit card update record, including date and status, but no other details specific to the constituent appear.

When the query is filtered by any information on the constituent record, such as "Constituent\Constituent record criteria is not blank," credit card update results linked to those constituents only display when users have rights associated with those constituents.

## Responses from Blackbaud Merchant Services

After Credit Card Updater runs, ***Blackbaud Merchant Services*** communicates various responses that trigger credit card information to either update or not update within ***CRM***. These responses are communicated from ***Blackbaud Merchant Services*** to ***CRM***, but do not appear on ***CRM*** revenue records or in *Query*; they serve only as triggers to either update or not update credit card information.

The following responses are examples communicated from ***Blackbaud Merchant Services***:

- Bad credit card type code
- Bad check digit value
- Invalid account number length
- Non-numeric account number
- Invalid expiration date
- Merchant not registered
- TransArmor unable to translate token
- Account closed or contact cardholder
- Credit card updated with new expiration date
- Credit card updated with new card number and expiration date

# Blackbaud Secure Payment Page Upgrade

To provide an optimal check out experience for ***Blackbaud Internet Solutions*** website users on multiple devices, you can now upgrade your static Blackbaud secure payment web pages to responsive web pages. You can select to upgrade each secure payment page individually, or you can upgrade all pages, across all of your websites, at the same time.

***Note:*** The Blackbaud secure payment page processes credit cards only; it does not process direct debits. This functionality has not changed between the static and responsive web page upgrade.

After you upgrade Blackbaud secure payment pages from static to responsive, you cannot use static pages again.

## Upgrade an Individual Secure Payment Page

In *Pages & templates*, the new Blackbaud secure payment preview tab appears from page properties when the page contains a part that integrates with the Blackbaud secure payment page. For example, if the page contains a Payment 2.0 part that uses the Blackbaud secure payment page, the tab appears.

The template examples that display on the tab are previews of the secure payment page's appearance with your organization's content. Template 1.0 displays a preview of the existing static page. Template 2.0 displays a preview of the responsive page after you upgrade.

***Tip:*** Use the horizontal bar to scroll and mimic page responsiveness for Template 2.0. You can also toggle the template examples between the desktop and mobile style sheet associated with the page, select the browser option in the **Preview with** field.

To upgrade the Blackbaud secure payment page to a responsive page, select **Use responsive web page for Blackbaud secure payments**. When you save the page, it upgrades immediately. Also, any recent changes to your style sheets, layouts, templates, and page also push to the Blackbaud server to update the page.

## Upgrade All Secure Payment Pages, Across All Websites

In *Administration*, *Sites & settings*, the new **Update all Blackbaud secure payment pages to a responsive web page** checkbox appears under the **Secure payment template update** setting.

When you select this and click **Update templates**, the process begins to upgrade all static secure payment pages to responsive pages. Also, any recent changes to style sheets, layouts, templates, and pages push to the Blackbaud server to update all secure payment pages.

# Anonymous Gift Information in Payment 2.0 Parts

The Payment 2.0 part in ***Blackbaud Internet Solutions*** now includes information about whether a donation is given anonymously. This information appears in the Payment 2.0 part shopping cart items list, the Payment 2.0 part confirmation page receipt grid, and the Payment 2.0 part acknowledgement email receipt grid.

# Masked Account Number Field in Queries

We have added a new field in queries for masked account numbers. The existing field **Account number** on the Direct Debit Account node in queries displays the entire account number. When used in printed materials such as acknowledgement letters, this could result in security issues if an entire account number is included. To offer an alternative, we have added the field **Account number (masked)**, which masks the account number except for the last four digits (for example, ****5678).

To take advantage of this new field in existing queries that include account numbers, you must edit the queries and change the selected field from **Account number** to **Account number (masked)**. You can continue to use the **Account number** field for situations in which you want the entire account number to appear.

# Correspondence Processes for Households and Members

General correspondence processes in *Marketing and Communications* under Manage Correspondence now have a checkbox to **Mail to primary household member when available**. When you add or edit a correspondence process, you can click **Edit** in the **Output format** field and mark a new **Mail to primary household member when available** checkbox on the Processing options screen.

When the new checkbox is marked, if the household has one or more members, the addressee and salutation information for the correspondence will be that of the primary household member instead of the information for the household itself. This makes the address and name format options more consistent with those available on communication templates for direct marketing efforts.

After you upgrade, the new **Mail to primary household member when available** option will be available for new and existing general correspondence processes but, by default, will not be marked. In order to take advantage of the new functionality, you will need to edit existing general correspondence mailings and mark the checkbox after you upgrade.

# Sort Order for Reciprocal Relationship Types

We have added a new sort order for use when editing the relationship types between two constituents. Previously, when a constituent had a relationship with a commonly used relationship pair (such as employee and employer) and you tried to edit the relationship, the “Edit relationship” screen could take a long time to load in databases with extremely large numbers of relationships between constituents, as the program was trying to calculate which relationship pairs were the most common between your constituents.

To improve performance, we have added the ability to change the functionality so that the sort order for relationships in those relationship fields is alphabetical instead of being sorted with the most commonly used relationship pair at the top of the list. However, when you change the sort order to alphabetical instead of "Most frequently used pairing," the reciprocal relationship will not default automatically to the reciprocal relationship field. The new **Sort method for reciprocal relationships** setting is on the Relationship Types tab of the Relationship Settings page which you access from the **Relationship settings** configuration task in *Constituents*.

***Note:*** After you upgrade, the new setting will be set to “Most frequently used pairing” to match the current behavior. In order to see the performance improvements, you must change this setting to “Alphabetical” instead.

# PhoneFinder and Do Not Mail Addresses

The PhoneFinder process in the Data Tune-up section of *Administration* now has an **Include addresses marked as Do Not Mail** checkbox on the "Edit PhoneFinder submit process" screen. This gives you the flexibility to choose whether or not to include those records. If you have many constituents who do not receive mail from your organization, you may still want to use addresses that are marked as "Do not mail" to help locate new or updated phone numbers for those constituents. However, if you use "Do not mail" to also indicate invalid or out-of-date addresses, you may not want to use those in the PhoneFinder process.

By default, this checkbox is marked to match existing behavior. In order to omit these addresses from the PhoneFinder process, you must edit existing PhoneFinder submit processes and unmark the **Include addresses marked as Do Not Mail** checkbox.

# Improved Matching in the Incremental Constituent Duplicate Search Process

With this enhancement, we have improved the "Incremental Constituent Duplicate Search Process" located in **Duplicates** which you access from *Constituents*. Previously, two constituents with addresses that were almost identical were sometimes not seen as duplicates by the process. The issue occurred when one address included a five-character postal code and the other included the ZIP+4 postal code with all other address information matching exactly.

To correct this issue, we added a new field to the "Custom settings" tab of the "Edit incremental duplicate constituent search process" screen. The **Number of characters to use for matching** field allows you to specify how many characters of the postal code to compare for the match criteria. The default for the new field is 12 but you can change it to suit the needs of your organization. If the value of this field is set to five, for example, the five-character postal code and the ZIP+4 postal code will now be seen as exact matches since only the first five characters are compared. A higher number represents a more stringent match criteria.

# Organization Setting: Non-Production Environment Checkbox

From *Administration*, *Sites & settings*, you can now select **This is a non-production environment** when you want to test or disable specific functionality in an environment that is not available to website users and email recipients. When this checkbox is clear, your environment is live and set to Production.

***Tip:*** When you upgrade to this version, the checkbox is *not* selected and your website remains in your Production environment. If you do select the checkbox, the setting applies to each website you host, whether it is one site or multiple sites.

Currently, there are two features you can alternate between Production and Non-production environments. The following table lists the feature and what you can do in each environment.

| Feature | Non-production | Production |
|---|---|---|
| **Secure payment template update** organization setting | When you update Blackbaud secure payment pages from static to responsive pages, a copy of each page template is created for you to view and test in the Non-production environment. This avoids interruption on your live, Production site. | When you update Blackbaud secure payment pages from static to responsive pages in Production, the pages are live on all of your live websites. |
| **Email jobs** organization setting | Disable email jobs sent from the *Email*, *Scheduled emails* functional area.<br>**Tip**: The Non-production environment does not prevent an email job from sending to recipients when you use the **Send after date** field in *Messages* or *Marketing Efforts*. | Blackbaud Internet Solutions sends messages for email jobs from the *Email*, *Scheduled emails* to recipients as expected. |

# Delete Constituent Images with the "Delete audit data" Global Change

The "Delete audit data" global change now includes the option to select "Constituent images." When you add or edit profile pictures for constituents, each instance of the image is saved to the constituent audit tables, which can take up an unexpected and unwanted amount of space in the database. Now when you run the "Delete audit data" global change, you can specify to also delete constituent images from the audit tables. The images are not deleted from the constituent records, just from the audit tables. Existing "Delete audit data" global changes remain the same after you upgrade. In order to take advantage of the new setting, you must edit existing "Delete audit data" global changes and mark "Constituent images."

# Educational Institution Enhancement in Constituent Query

In constituent queries, we have added the "Educational institution record" field under Constituents > Education History > Educational Institution. Now, when you include the new "Educational institution record" field in a query, you can search for and select the exact educational institution to use.

Previously, you could use only the "Name" field under Constituents > Education History > Educational Institution, which relied on you entering the exact name of the institution, rather than searching for and selecting one. This resulted in potentially inaccurate or unintended results in the query in addition to potential performance issues. Existing queries will remain unchanged when you upgrade; however, you may consider whether or not to modify them to use the new "Educational institution record" field for more accurate results and better performance.

# Add Constituents to a Group in Bulk

To improve efficiency with group management, you now have the ability to add multiple constituents to a group at once, rather than just one constituent at a time. When you add a new group, you now have the option to pick a selection of constituents, in addition to selecting individual constituents.

You also have the option to use a selection when you add additional members to an existing group.

***Note:*** This feature is secured separately so that you can decide which system roles and users have rights to do this. There is no undo for this feature nor is there "delete group members in bulk" functionality, so set security for this feature carefully.

***Note:*** When someone in a selection is already an active member of the group, nothing changes with the group member. When someone in a selection is a previous or inactive member of the group, the constituent becomes an active group member again and start date for the constituent's group membership is reset to the date entered.

# Mark Constituencies Inactive

You can now mark constituencies as inactive. Inactive constituencies are not available to assign to constituents and do not appear as filters in queries and reports. They will also be considered inactive for the Data Warehouse and will not be included in the ETL refresh process. When you inactivate constituencies you no longer need, you can improve system performance because processes such as queries do not need to consider data that is no longer relevant to your needs.

When a constituency is marked inactive, it is no longer displayed in the summary section of constituent records.

To manage constituencies, from *Constituents*, click **Constituencies** under **Configuration**. To mark a constituency as inactive, select it and click **Mark inactive**.

Active constituents show a checkmark on the Active column on this page. To reactive an inactive constituency, expand it and click **Mark active**.

# Donor Constituency Criteria

We have made some design changes to the way you manage constituency criteria in the Constituencies page. Previously, you managed this information from the Donor constituency criteria section of the page. Now, you manage criteria directly from the constituencies themselves. For constituencies that allow criteria settings, which include Donor, Loyal donor, and Major donor, you can now expand the constituency and click **Edit constituency criteria**.

This new option displays an edit screen for that constituency only.

Since you can now mark a constituency as inactive from the constituency itself, this is also where you manage the donor criteria specific to that constituency, when applicable.

To determine whether to include recognition credits in constituency definition calculations, you still click **Edit** on this page. The new Edit donor constituency criteria screen appears.

To manage constituencies criteria, from *Constituents*, click **Constituencies** under Configuration.

# Constituencies Performance Improvements

In order to improve system performance and usability, we have redesigned how the program handles constituencies.

## Constituency Stored-Value Refresh Process

We have added a constituency refresh process to the maintenance tasks available in *Constituents*. In order for constituencies to be applied correctly when you run a query on constituencies, you must run this process on a regular basis. We recommend that you schedule this process to run daily. In addition, when you reactivate constituencies that you had previously marked as inactive, the reactivated constituencies are not applied to records until you run the refresh.

To run the process, from *Constituents*, click **Constituency stored-value refresh processes**. On the Constituency Stored-Value Refresh Processes page, click **Add**. The Add a constituency stored-value refresh process screen appears.

The stored constituency values are also available in the Blackbaud Data Warehouse.

After you enter a name and description, select the constituencies you want to refresh, including user-defined constituencies. You can use a selection to select specific constituents to apply the refresh to, or leave the **Selected constituents** field empty to apply the constituency refresh to the entire database. Click **Save**.

# Query on Constituencies

We have added a new node to *Query* which uses the new stored values for constituencies in order to help the performance of query processing. The new Constituencies (Stored Values) now is available for you to use, in addition to the existing Constituencies node. The existing Constituencies node still calculates constituency values when the query is processed. Some constituencies, such as "Major donor" are calculations based on criteria you specify, so those calculations can take more time to process. The new Constituencies (Stored Values) node simply returns the constituency values that were calculated the last time you ran the "Constituency stored-value refresh process." You can include the

**Refresh date** when you use to the new node in order to make sure the constituencies from the refresh process are recent.

## User-Defined Constituencies Global Changes

The "Add user-defined constituency" and "Delete user-defined constituency" global changes update constituent records with the user-defined constituencies you specify. User-defined constituencies are set up under Code Tables in *Administration*. For example, if you have a user-defined constituency of "Neighbor," you could add it automatically to all constituents with a local postal code.

The "Delete user-defined constituency" global change removes these constituencies when a constituent no longer meets the criteria you defined. Now, when you run the global changes, the constituencies are updated as they are when you run the "Constituency stored-value refresh process" from *Constituents*. The global change processes automatically refresh the appropriate records in your database, so that the constituencies in the "Constituency (Stored Values)" node of a constituent query are updated.

# Service Pack 7

These features were introduced in Service Pack 7 after the original ***CRM 4.0*** release.

## Refund Details

With this release, when you issue a refund for a credit card transaction, you can now view refund details on the Details tab of the payment record as well as the Reconcile transactions and disbursements page in *Treasury*. We also added a new query to help you further review refund information.

## Details Tab on a Payment Record

When a refund is issued, a new **Credit Card Refunds** section appears on a payment record and displays the date and amount of the refund.

***Note:*** The ability to issue a refund for a credit card transaction by editing or deleting an individual payment (not in *Batch*) is existing functionality. As a reminder, refunds are only possible when the gateway that processed the credit card (such as ***Blackbaud Merchant Services***) supports refunds. For information about issuing a refund, refer to Refund Credit Card Transactions.

## Reconcile Transactions and Disbursements Page

From the Reconcile transactions and disbursements page in *Treasury*, refunds are now reflected on the View by transaction tab. The original amount of the payment is shown as a separate row with any refunds for that original charge shown in subsequent rows. This allows you to easily view the amount of the original charge in addition to the refunds.

For transactions processed through ***Blackbaud Merchant Services***, click a transaction to expand its row and display an action bar. Click **Gateway details** to view refund details.

- Gross amount = refund amount
- Fee = zero
- Net amount = refund amount

## Credit Card Refunds Query

We added a new "Credit Card Refunds" query to help you review refund details. You can use fields such as **Amount**, **Date**, **Payment record ID**, and **Refund record ID** to quickly locate refund details

associated with credit card transactions.

# Invitee and Invitation Information in Constituent Query

We have added the ability to query on event invitees by invitation lists in constituent queries. You can now use the new “Constituents>Invitees” node which can sort or filter the results by invitation list. If you have any existing queries using the "Constituents>Invitee" node and you would like to sort or filter by invitation list, you should modify them to use the new “Constituents>Invitees” node.

# Improved Constituent Interactions List

To improve flexibility in managing interaction information for individual constituents, the Interactions data list has been converted to list builder format to include more advanced options for sorting, navigating, and customizing data in the list. Group and household constituents already use a new list builder format. You can access the Interactions list builder on the Interactions sub-tab on the “Documentation and Interactions” tab of a constituent record.

In order to opt-in to the Interactions list builder for individual constituents, you will need to access design mode by clicking the **Toggle design mode on** button in the upper right corner of the program. On a constituent record, click **Edit tabs** in the design mode view at the top of the record. On the Edit page tabs screen, find the Interactions tab and edit it. Go to the Sections field. There will be two list builders shown: one for groups and one for individuals. The one for groups will already have the "Visible" setting set to "=CBool(Page.Fields!ISGROUP)" and that should remain unchanged. Change the "Visible" setting for list builder for individual constituents to "=Not CBool(Page.Fields!ISGROUP)" and the data list "Visible" setting to "False."

# Recurring Gift Status Information in Query

We have added the ability to query on recurring gift status activity in revenue queries. We have added the "Revenue>Recurring Gift Amendments" node to revenue queries with the "Recurring gift previous status," "Recurring gift status," "Recurring gift status change reason," and "Recurring gift status change reason description" fields. You can edit existing queries to include these new fields.

# Constituent Summary Tiles Enhancement

When you make changes to a constituent record to "Show more" or "Show less" of the constituent summary of the record which includes the constituent summary tiles, the program remembers your settings the next time you open a constituent record. This is not a system-wide setting, but instead is specific to each user.

# Search for Constituents by Site

We have added the **Site** field to several constituent search screens so that you can further refine your search parameters. The updated search screens include: Constituent Search, Constituent Search by Name or Lookup ID, Committee Search, and the corresponding search screens in batches, when available.

# Smart Field Categories

We have added the ability to assign categories to smart fields. When you add or edit a smart field, you can now choose to assign a category to it.

You can define your categories to best suit the needs of your organization. You can then sort or filter smart fields by category on the Smart Fields page under *Administration* to help you navigate the list more easily.

To sort or filter by category, you use the new **Category** column, which now appears on the list by default. In addition, we have added the columns **Created by** and **Created on** to this list, which you can also use for sorting or filtering smart fields. These two columns do not appear on the list by default, but you can add them by clicking **Columns** and selecting them.

# Improved Options for Global Marriage Settings in Constituents

We have added two new settings to the **Global rules for married constituents** section on the Marriage tab of the Manage Life Changes page. To access this page, click **Manage life changes** under **Configuration** in *Constituents*.

You can now select whether or not to have the primary phone number and email address automatically copied to a spouse's constituent record when you create the spouse relationship. Previously, when you added a spouse, all primary contact information (address, phone number, and email address) was copied from the existing constituent to the spouse record. Now, based on the new "Global rules for married constituents" settings, the primary phone number and email address may or may not be automatically copied to the spouse's record depending on your configuration settings. The primary address, however, is always copied to the spouse record.

By default, the new **Copy primary phone number to spouse's record** and **Copy primary email address to spouse's record** checkboxes are marked. If you do not want this information copied to spouse records, you can change these configuration settings.

# Service Pack 8

These features were introduced in Service Pack 8 after the original ***CRM 4.0*** release.

## Email Settings

You can now easily indicate whether to send multiple or single copies of emails from ***Blackbaud Internet Solutions*** when two or more constituent records include the same email address. This setting eliminates the need for you to remove duplicates before you send emails.

To send one email to multiple constituents with the same email address, clear the new **Send a unique email to each constituent who shares the same email address** option in *Sites & settings*. You typically select this when you want constituents, such as spouses, who share email addresses to each receive a copy of messages.

***Note:*** This checkbox is selected by default. You do not need to clear it if you want the program to continue to send emails to each constituent.

This setting applies to constituents in an email list with a data source of Constituent or Imported. When you clear the checkbox, merge fields populate with information for the constituent whose record has been in the database the longest. When you select the checkbox to send a unique email to each constituent, merge fields populate with each constituent's specific information.

# Delete Email Messages and Newsletter Issues Permanently Update

As a follow up to the new **Delete email permanently** organization setting in ***Blackbaud Internet Solutions*** *Administration* (released in version 4.0 Service Pack 5), you can now select to delete messages and newsletters based on whether the email is beyond a certain number of days, months, or years. This enhancement automatically deletes email from the *Email* area of ***Blackbaud Internet Solutions*** and the back end of the database.

***Tip:*** For more information about the original implementation of this setting, refer to **Delete Email Messages and Newsletter Issues Permanently**.

To delete email permanently based on age, schedule the new **Automatically delete email older than** option.

To delete email older than a certain age, select the second option. In the field beside it, enter the number of days, months, or years to delete email, and then select an option in the drop down. For example, to delete email older than two years, enter "2" in the field and select Years.

When you use this setting, the program calculates the age based on the email sent date. The process then deletes the applicable email from *Email* before deleting it from the back end of the database. If you leave the default as **Never**, the program only removes email from the back end of the database.

***Note:*** To prevent the program from running the **Delete email permanently** process, it is important to remember that you select **Never** under **Business process frequency**. This is part of the original feature that released with Service Pack 5. Also, as a result of this new **Automatically delete email older than** feature, the **Delete email that is older than [ ] day(s)** field has been removed from this setting.

# Service Pack 9

These features were introduced in Service Pack 9 after the original ***CRM 4.0*** release.

## Appeals for Payments in Enhanced Revenue Batch

With this enhancement, when you add a payment toward an existing commitment in Enhanced Revenue Batch, the appeal associated with the commitment is now defaulted onto the payment. However, if you add an appeal for a payment to the batch row before you select the application, the appeal will not be changed. Also, if the batch template has a default appeal, the appeal from the template is used as the default.

## Add Constituent Attribute Global Change Enhancement

We have added the ability to use the “Add constituent attribute” global change process to add more than one instance of the same attribute category but a different attribute value to a constituent record. For example, you might want to assign an attribute category of "Distinguished Alum" with a value of "Athletics," as well one with a value of "Academics" to a graduate who earned honors in both areas.

This can occur only when the attribute does not have the **Allow only one per record** setting marked and when the global change process does not have the **Overwrite existing value** setting marked.

# Title Settings

In ***Blackbaud Internet Solutions***, organization settings now includes the **Titles** section so you can filter the options that appear from the **Title** drop down field on web pages. Previously, all the titles from ***Blackbaud CRM*** appeared in the list. Use this feature to remove titles that are not frequently selected by website users, such as General and Chief.

When you upgrade to this version and view the new setting, all active titles from ***Blackbaud CRM*** appear with each checkbox selected. To make a title unavailable for your site, clear its checkbox and click **Save** on the General tab.

Titles you do not select are only available on your website when users are logged in and their profiles include existing titles that do not appear in the drop down list. In those instances, the program adds the titles to their form drop down lists.

***Note:*** If your website includes custom JavaScript to restrict **Title** field drop downs, we recommend you test these fields on your site after you install this version. It is possible you no longer need this customization.

# User Login Part: Constituent Attributes

In ***Blackbaud Internet Solutions***, the User Login part now includes the ability to change the order of the constituent attributes appearance on the form and modify their labels. Under **Attributes**, click and drag the dotted button on the far left to move an attribute in the updated grid. To change the label text, enter it in the **Caption** field.

These updates provide flexibility so you can specify how the attributes should appear on the form, such as if you want them in the same order as they are arranged in ***Blackbaud CRM***.

# Email Address Type Field

To enable you to specify which email address to use for messages you send to constituents in ***Blackbaud Internet Solutions***, a new **Email address type** field is now available when you create templates from **Email, Templates** or messages from **Email, Messages**. When a constituent does not have the email address type you select in the field, the message is sent to their primary email address.

# Sending a Final Email

To increase email efficiency in ***Blackbaud Internet Solutions***, we have enhanced the send final email process to help make sure the correct group of recipients receive your intended email. Now, when you click **Send final** on an email message, a new Send Status tab appears for you to view the target lists, the number of recipients in each list, and when the lists were last refreshed.

***Note:*** This new feature only applies to email sent from *Messages*.

To make sure the latest recipients are in the queries that the lists use, click **Refresh Lists**.

A message appears for your review before clicking **Start Refresh** to begin the process.

***Tip:*** It is important to read this message. It informs you that you can do other tasks in the program while the refresh processes, but you cannot send the final email. It also states the refresh may take an extended period of time depending on the size and complexity of your lists.

After the refresh completes, click **Yes** to actually send the final email to recipients.

When you do this, one more refresh occurs automatically for lists that use dynamic queries. This may cause the recipient numbers on the Sent Status tab to differ from the final sent numbers that appear in email reports. If your lists use static queries, this does not apply. For more information about email statuses, refer to the ***Blackbaud Internet Solutions*** *Email Guide*.

***Note:*** When you enter a date in the **Send after date** field, the email does not send until the date and time you specify in that field.

# Integration Services Setting: Number of Records to Update

When you view the **Blackbaud CRM Integration service** setting on the Schedules tab in ***Blackbaud Internet Solutions*** *Administration*, it now displays the number of records to update in ***Blackbaud CRM***. This is an informative way for you to monitor the amount of data the setting needs to process, which helps you avoid integration delays from ***Blackbaud Internet Solutions*** to ***Blackbaud CRM***.

When you select the hyperlink for the number of records to update, a screen appears that lists each record type to update. The number of records to update for each type also appears, along with the type's last integration date.

To view the latest data currently waiting for process from ***Blackbaud Internet Solutions*** to ***Blackbaud CRM***, select the **Refresh** icon. When the refresh completes, the date and time update to reflect when you last refreshed the number.

Under **Frequency**, you also now specify the number of records to send to ***Blackbaud CRM*** during each schedule in the updated interval and daily options.

***Tip:*** This feature surfaces the number of records on the Schedules tab that previously only appeared in the back end web.config file.

# AddressFinder and DeceasedRecordFinder Enhancements

We have made some improvements to the performance and security of the *AddressFinder* and *DeceasedRecordFinder* processes in Data Tune-Up. On the main Data Tune-Up page in *Administration*, we have added a **Finder settings** configuration task.

You should contact Support to receive your new credentials to enter on the Edit finder settings screen. You will also need to enter some information about your organization.

We have also separated each process into four separate steps, rather than three. Previously the first step created and submitted the file to Blackbaud for processing. Now the first step is to create the file and give you a record count of how many records are included. This is so that you can better manage and track your actual number of records submitted for processing against the number of records you have contracted with Blackbaud to process. Step two is when you submit your file to Blackbaud. Step two also alerts you as to how many records you are submitting to be processed; you may be charged if you submit more records than you have contracted with Blackbaud to process.

The final two steps remain the same with the exception of the step number. In step three (formerly step two), you retrieve the processed file from Blackbaud. And in step four, the final step (formerly step three), you can update the records in your database.

After you upgrade, you must enter the information for this new configuration task before you can run any existing or new *AddressFinder* or *DeceasedRecordFinder* processes.

# Email Security Enhancement

Due to updated security enhancements, there is now more stringent security to enforce strong email passwords.

Strong passwords must meet the following criteria:

- Are case-sensitive
- Must be a minimum of 8 of characters long
- Cannot contain any part of your full name
- Cannot contain any part of your account name
- Cannot be one of your last 24 used passwords
- Must contain a combination of uppercase letters, lowercase letters and numbers:
  - Uppercase letters (A - Z)
  - Lowercase letters (a - z)
  - Numbers (0 - 9)
- May contain one of the following special characters: ! $ . # %

After updating to Service Pack 9, you may be required to change your password before you can send email. To determine whether you need to change your password, go to **CRM > Administration > Configuration > Email Services** and confirm if you can successfully connect. If you receive an error, contact Support to help you update your password.

# Service Pack 10

These features were introduced in Service Pack 10 after the original ***CRM 4.0*** release.

## Link Additional Revenue Types to Opportunities

There are now additional types of revenue that you can link to opportunities in order to track high-impact donations. Previously, ***Blackbaud CRM*** allowed you to associate pledges and donations with an opportunity to signify the level of fulfillment of the opportunity. You now can link opportunities to event registrations, matching gift claims, and planned gifts.

To link a matching gift claim or event registration, from the record, click **Link opportunity** under **Tasks**. Planned gift revenue records have an **Opportunity** field you can use to link the records.

To unlink opportunities, click **Unlink opportunity** under **Tasks** on the matching gift claim or event registration. For planned gifts, you can edit the revenue record and remove the opportunity from it.

Once you link these items to the opportunity, a link to the opportunity record appears in the Details section of the Designations tab.

You can also add these items to an opportunity from the Associated Revenue tab. Click **Add to search for existing unassociated revenue**. The Opportunity Unassociated Revenue Search screen appears. From this screen, you can filter the results to specific revenue types.

In the Opportunity details section of the Details tab, the **Revenue committed** and **Total paid amount** fields now reflect the additional revenue in their totals.

The **Total Revenue Committed** and **Total Amount Paid** fields on the My Fundraiser page are also updated with the revenue amount.

**Solicitor Credit Rules**

Solicitor credit allows you to track the overall performance of your solicitors by giving credit to one or multiple solicitors on a revenue record. Once you link an opportunity to revenue, solicitor credits associated with the opportunity will default to the revenue.

***Note:*** If you choose to unlink the opportunity from the revenue, you must manually remove the solicitor credit rules.

## Query Enhancements for the Credit Card Updater Service

We have added some additional query functionality to enhance your ability to use the Credit Card Updater Service. Originally, we provided a Credit Card Updates query that you could use to help track changes made by the Credit Card Updater Service.

Now, we have added a "Credit Card Updates" query node in Constituent query and in Revenue query. We now also include the **Action** field in the query nodes so you can more readily find constituents with a "Need to contact" status. With these enhancements, you can more easily query on and mail to constituents who were included in the Credit Card Updater process, but whose card updates were not

successful. Contact with these constituents may help you secure new cardholder information from your loyal supporters.

# Giving List Enhancement to Include Recognition Credits

We have enhanced the Giving List by now including the ability to use this report based on recognition credit information instead of just revenue information. In the Giving List report, you can now use the Summary section to indicate whether the report should include just revenue information (as it did before) or whether it should include recognition-based information instead. The other filters, such as date ranges and more, can still be used and will be applied to recognition information.

***Note:*** The Giving List requires the use of the Blackbaud Data Warehouse.

# Attributes for Appeals, Sponsorships, and Financial Transaction Line Items

To help improve the usability and flexibility of the program, we have added the ability to create attributes for several additional record types: appeals, sponsorships, and financial transaction line items. In Administration, you can create the attribute categories for these record types. After you create the attribute categories, an attributes tab will appear for these different records.

# Credit Card Tokenizer

Your organizations may engage the services of third-party vendors to help manage constituent-related information, such as to update existing donor or constituent information or to recruit new donors. Third-party vendors who collect sensitive credit card information can use the ***Blackbaud CRM*** Credit Card Tokenizer to easily send this information securely to the ***Blackbaud Payment Service*** for

tokenization. The vendor can then destroy any sensitive credit card information and return only the secure token information back to your organization to import into ***Blackbaud CRM***.

The Credit Card Tokenizer offers two methods to securely tokenize sensitive credit card information.

- Vendors can write custom code to securely deliver credit card information directly to the Web Service endpoints mentioned below. The credit card information is tokenized and stored in the ***Blackbaud Payment Service*** and vendors will receive the secure token information for cards directly back from the endpoints. For more information, see the Credit Card Tokenizer endpoint documentation at https://www.blackbaud.com/files/support/guides/enterprise/CreditCardVaultEndpoint/inwebapi-developer-help.htm.
- Alternatively, your organization can provide a specific URL found in *Administration*, with vendor- and user-specific login credentials, to each vendor. These credentials use the same user access and authentication controls as ***Blackbaud CRM***. The URL is to a secure .ashx page on the same web server as ***Blackbaud CRM***. The vendor can then log in to the Credit Card Tokenizer page and select a file of constituent and credit card information to upload. The file is then submitted to the ***Blackbaud Payment Service*** and vendors will receive the secure token information in a return file to download.

For both methods, the CreditCardVault AppFx Web Service endpoint accepts credit card information, wraps it up in a call to the ***Blackbaud Payment Service***, and then returns tokens in place of sensitive credit card information.

***Note:*** No credit card processing happens during this process, nor is any sensitive information written to the disk. Sensitive credit card information is simply submitted by a third-party vendor the organization has contracted with to the ***Blackbaud Payment Service*** for tokenization. The return file to the vendor contains cardholder names, last four digits of the card numbers, along with the credit card tokens. If additional information is included in the original file, such as other constituent information not related to cardholder information, that information is included in the return file. No sensitive card number data is returned, even if the card could not be tokenized. In that case, relevant exception messaging from the ***Blackbaud Payment Service*** is provided along with the cardholder names. Any sensitive information is completely removed from ***CRM*** servers after the file is returned.

# Additional Recurring Gift Information in the Data Warehouse

To help improve reporting from the ***Blackbaud Data Warehouse***, we have added additional recurring gift information. The additional information includes first installment, last installment, recurring gift amendments, recurring gift installments, and recurring gift past due amount.

# Additional Education Information in the Data Warehouse

To help improve reporting from the ***Blackbaud Data Warehouse***, we have added additional education information. The additional information includes academic catalog, education, and involvements.

# Email Performance Statistics Enhancements

To modernize email and improve statistical information to current industry standards, performance statistics for email messages have been enhanced in Blackbaud Internet Solutions. To centralize the data, you now view most statistics for an email message in one grid instead of clicking multiple tabs and sub-tabs. After you send a message, its row on the Messages page updates to display the grid. The percentages and counts that display update automatically each time you access the grid so you always view the latest statistics.

***Note:*** The email performance statistic enhancements are only available in *Email* > *Messages*, not in *Email* > *Campaigns* or *Email* > *Newsletters*.

From *Email*, *Messages*, select a message and click **Click here to view report** ( ) in the **Action** column. The performance statistics grid displays below the message row.

The top row of the grid displays the email activity percentages for **Open rate**, **Click rate**, and **Transaction rate**, as well as the **Average gift** amount raised as a result of the message. You can hover over each statistic title to view a description of how the value was calculated.

The bottom row of the grid lists email activity in total amounts for **Recipients**, **Opens**, **Clicks**, and **Transactions**. You can click each amount to view a list of email addresses associated with the statistic. The **Total raised** amount is also shown.

Next to the statistics grid, additional information displays.

Here you can view the distribution lists used for the message, the number of messages that were not sent or that resulted in bounces and opt-outs, and the email job status. When you click the **Not Sent**, **Bounces** and **Opt-outs** values, you can view more information about these statistics, such as the associated email addresses.

Click **Additional Information** to display more details about URL performance, total number of views and unique viewers, total number of transactions, and the message content and properties. You can also export the email statistics to a *.csv file. Click **Export**, then select either Summary or Details.

The **Email Status Log** icon displays in the **Action** column and to the right of the statistics grid next to **Status**. Depending on the status of the email job, the icon displays as one of the following:

- ✓ - Completed
- ⓘ - In progress
- ⚠ - Failed

You can click the icon to display more information about the email status.

# Confirm Email Address Field

To improve email address accuracy, multiple parts now include the option to include a new **Confirm email address** field. When you select to display it on a web page, website users must enter their email address two times. Blackbaud Internet Solutions then compares the two email addresses to make sure they match.

The following parts now include this field.

- Donation Form
- Event Registration Form
- Membership Form
- Sponsorship Form
- User Login Form

# Security Update

As part of our normal product improvement processes, we review our security measures, protocols, and infrastructure on an ongoing basis. Blackbaud Internet Solutions was automatically updated in this release to include security improvements for credit card processing in compliance with Payment Application Data Security Standard (PA-DSS). Please refer to this list to determine whether your organization needs to take any action.

- **Enhanced Password Protection:** We now use industry-tested and accepted hashing algorithms to encrypt and store user passwords. This provides stronger protection for user data as passwords are

no longer stored in the database. However, no changes are required by your organization if your website uses standard password functionality in Blackbaud Internet Solutions.

***Note:*** If your organization uses a customization to integrate your website with a third-party single sign-on system, the customization may not work correctly. We recommend that you consult your single sign-on system provider to determine how the PA-DSS 3.2 requirements may affect your integration with Blackbaud Internet Solutions.

- **Site-Wide Secure Pages:** Previously, you could require encryption for all pages, secure content, or administration pages in *Sites & settings*. Now, Blackbaud Internet Solutions requires encryption for all pages on your website to provide site-wide security and protect your users' connections to your website. The URLs for all Blackbaud Internet Solutions web pages use “https" to securely render the pages via Transport Layer Security (TLS) protocol. This provides three layers of protection: encryption, data integrity, and authentication.

  ***Note:*** If your web pages incorporate content from non-secure sites, the content may not display or website users may receive a warning that the site has mixed content. This occurs because the Blackbaud Internet Solutions page uses a secured HTTPS connection, but some of the content on the page is referred by a non-secured HTTP URL. Non-secure content can be located in Formatted Text or Unformatted Text parts, the page layout, or the site style sheet. To correct this issue, identify affected parts and change the URL for the external content to a secured HTTPS connection.

- **Improved Security for Testconfig Page:** Testconfig is a page on your Blackbaud Internet Solutions website that reveals helpful information about your site's configuration, product versions, server-to-server connectivity, and more. To improve its security, testconfig.aspx is now accessible only from your local server.

# JQuery Version Upgrade

With this release of Blackbaud Internet Solutions, we have upgraded the JQuery version from 1.7.2 to 1.12.3.

# Support for International State Fields

Blackbaud Internet Solutions now uses existing CRM address formats to determine whether to display or hide the **State** field on all web pages that allow users to enter address information.

Previously when entering addresses for any nationality, the **State** field always displayed, except for the UK, Australia, and New Zealand. Now, if a **State** value does not apply to the selected country, the **State** field is hidden on the web pages. If the **State** value is in CRM international address formats for the selected country, then the **State** field is visible on the web page and is required by Blackbaud Internet Solutions.

***Note:*** The **State** field still displays for the United States, United Kingdom, Australia, New Zealand and Canada even if the **State** or **State Abbreviation** value is not included in the address format in CRM.

This enhancement was made to the following Blackbaud Internet Solutions parts:

- Donation Form

- User Login Form
- Payment 2.0 Form
- Event Registration Form
- Profile Update Form

## Upcoming Change for Email Forwarding

At Blackbaud, we are committed to providing you with tools that leverage the latest market trends and technology. We have reviewed email forwarding needs and concluded that alumni and other users will be better served by other email forwarding vendors that provide more advanced capabilities. For example, email forwarding solutions like Google offer full email hosting services as opposed to only email forwarding. In light of our research, we recommend that your organization transition from the built-in email forwarding functionality in Blackbaud Internet Solutionsto Google's free email forwarding service in early 2017.

For more information about Google's email forwarding service, visit the Google Domains Help Center. You can also review how to set up email forwarding in Google. Blackbaud Customer Support representatives will be available to assist your organization with the migration process.

# Service Pack 11

These features were introduced in Service Pack 11 after the original ***CRM 4.0*** release.

## Blackbaud Data Warehouse ETL Snapshots

This feature helps address performance and other related issues with the ***Blackbaud Data Warehouse*** and the ETL refresh process. To help address these issues, we have added a new setting to "Advanced Options" of the data warehouse deployment wizard to "Use Database Snapshots," which is enabled by default when you upgrade.

With this setting enabled, each time you run an ETL refresh process, the process will create a database snapshot of the CRM database. The process will run against the snapshot during the refresh rather than the OLTP database itself. The snapshot is automatically deleted after use.

Note that the user accounts for users running the ETL refresh process will be automatically granted "CREATE ANY DATABASE" permissions on the server and "db-owner" permissions on the CRM database, which are required to take use this new feature successfully. Custom ETL packages which write back to CRM rather just reading from the database will need to be updated to use the new "writeback" connection or will otherwise fail. This connection string takes its value from the new configuration file "BBDW_ETL_WRITEBACK_CONFIG.dtsConfig," which is automatically created and updated during deployment with the original configuration file "BBDW_ETL_CONFIG.dtsConfig." Additionally, a new environment variable to point to the new configuration file, "BBETL_WRITEBACK_[database name]_RPT_BBDW," is automatically created and updated with the original environment variable, "BBETL_[database name]_RPT_BBDW."

To take advantage of this fix, you must redeploy the ***Blackbaud Data Warehouse*** and complete an incremental refresh. For more information, see http://kb.blackbaud.com/articles/Article/107190.

## Locations for Constituent Interactions and Major Giving Plan Steps

We have added a **Location** field for constituent interactions and for major giving plan steps. You can select an existing, active address from the constituent record to use as the location, such as "Home" or "Work." You can also select "Other" and then enter a different location or address in the **Other location** field.

## AddressFinder and the New Digital Processing Acknowledgement Form

With this release, the ***AddressFinder*** service in the Data Tune-Up section of *Administration* now requires an electronic Processing Acknowledgement Form (PAF) each time your organization submits a file to Blackbaud. The new electronic PAF is a simple acknowledgement checkbox on the "Submit file" screen in ***Blackbaud CRM*** which you must mark each time you submit a file to the ***AddressFinder*** service. This indicates your organization is granting consent for Blackbaud and our vendor to process the file. For more information on the United States Postal Service PAF policies, see http://kb.blackbaud.com/articles/Article/105383.

# Event Registration Form

This service pack includes a new Event Registration Form part with functionality improvements and usability enhancements to both the Edit Part screen and the web pages that the part generates on your website.

New functionality improvements for the part include increased support for appeal and campaign data and integration with event preferences. Usability enhancements include better organization of the part's design options to avoid scrolling, and help text improvements to clarify what appears on the page. For website users, usability enhancements include a simplified registration process that has been reduced to three steps and numerous quick links so users can autofill registrant data.

***Show Me:*** Watch a video about the new Event Registration Form part.

## Event Registration Form (Classic)

The original Event Registration Form part is now called Event Registration Form (Classic). It does not upgrade to the new event part and remains available to use on your website with its original design. There are a few features the Event Registration Form (Classic) includes that the new Event Registration Form part does not, such as Payment 2.0 part integration and the ability to link to another page from the event. You may want to consider this when you create the new part.

## Event Registration Form: Website

When you include the new Event Registration Form part on a page in *Site explorer*, the registration options appear on three separate pages on your website. Each page includes a status bar so website users can view their progress as they complete the event registration process. Users can click the button in the status bar to go to the previous or next page.

***Note:*** The Step 3 *Payment* button appears when a user selects a paid event type on the Step 1 *Selection* page and then clicks **Continue**.

**Step 1 Selection** — The first page of the event registration process displays event details from Blackbaud CRM such as the descriptions, start dates, and times for events. Website users select events to attend and the number of registrants, and if you include a field for donations, they can also make additional gifts. The summary of the user's selections displays at the bottom of the page and dynamically updates as the user enters information.

**Step 2 Registration** — On the second page, website users enter details for all registrants. To copy contact information, users can select **Use this address for all registrants** and click **Apply to all registrants** for certain fields. After users enter registrant information for an event, links for the registrants appear on the next event, and users can click the links to autofill registrant information.

In the following screenshot, you can view the checkboxes and links that allow users to autofill additional registrant information.

The user also selects applicable options for the event depending on the details you select to include on the part. For example, if you select to include an event preference for dietary requirements, the user may select vegetarian.

**Step 3 Payment** — On the third page of the event registration process, the program renders the secure payment page on the Blackbaud server to process transactions for event registration payments. When website users select multiple events with multiple charges, the total cost automatically defaults on the secure payment page. For information about the secure payment page, refer to the *Parts Guide*.

***Note:*** When you include free events on the part and a website user only registers for free events, this page does not appear.

When users submit event registrations, event transactions download into the BBIS Event Registration Transaction Batch type in Blackbaud CRM. After you process transactions, event registration data appears on the applicable records in Blackbaud CRM. For information about event registration transactions and where data maps to in Blackbaud CRM, refer to the *Web Transactions Guide*.

## Event Registration Form: Edit Part

When you design the new Event Registration Form part, you now configure each event's options in its own configuration screen. You can enter text and HTML in the **Description** field and select **Use event capacity** to limit the maximum number of registrations based on the event record's capacity in Blackbaud CRM. The **Event price options** grid includes new column headers and help text to clarify what appears on the web page. You can also sort the event types in the order you want them to appear on the page.

Under **Registrant options**, you can expand each event type and select whether to let users register additional guests as anonymous. You can also select and reorder biographical fields and additional options that will appear on the registration page. In response to your feedback in the idea portal, the part now also integrates with preferences from the event record in Blackbaud CRM. Event preferences are listed with participant attributes under **Additional options**. In both grids, you can change the text that displays in the **Caption** field. In the **Include** and **Required** columns, select which fields to display and require for primary registrants and their guests.

When you click **Options**, important options appear for the part such as how many people can be registered in one web transaction and which constituent code to apply to registrants. You can also select an appeal to associate with registration payments and specify whether to include a field for additional donations on your registration page. In this section, you also select how you want free events to appear on the page.

When you create a new Event Registration Form or edit it, the Edit Part screen is condensed by the event configuration screen and the **Options** link. This greatly enhances your ability to view the part so you can quickly identify the area to make your changes.

# Appeal and Campaign Tracking for Events

On Event Registration Form parts in Blackbaud Internet Solutions, you can now select appeals from Blackbaud CRM to associate with event registration payments. From the Design tab, under **Options**, a new section for **Appeal tracking** displays.

***Note:*** If an Event Registration Form part includes only free events, the **Appeal tracking** section is grayed out.

To select an appeal, click the binoculars. Any appeals that are already associated with the event record in Blackbaud CRM display on the search screen. You can also click **Search** to view and select from all active appeals.

Event registration payments are automatically associated with campaigns that have been added to the event record in Blackbaud CRM. Within a BBIS Event Registration Transaction Batch in Blackbaud CRM, you can now modify the appeals and campaigns that are associated with event registration payments. When you review transaction details in an uncommitted batch, you can now click **View appeal and campaigns details** on the Payment tab.

In the window that opens, you can select the Appeal or Campaigns tab to review and modify the appeal and campaign selections for event registration payments prior to committing the batch.

# Communication Preferences Form Enhancements

We've made some enhancements to the Communication Preferences form in Blackbaud Internet Solutions to provide functionality improvements to email communication preferences.

## New Email Address Selector Property

Previously, users had the option on the Communication Preferences form to specify which email address they wanted to use to receive email communications. Because some customers prefer not to give users this choice, we've added the ability for administrators to disable the email selection option globally for all email types.

Use the new **Email address selector** property on the Form tab to configure whether or not to allow email address selection on the Communication Preferences form.

- Select **No** (default) if you do not want users to select an email address preference. The email selector does not display on the Communication Preferences form and the users' primary email address is used for all email communications.

  Because Blackbaud Internet Solutions does not honor the email address preference, it is recommended that if you use only Blackbaud Internet Solutions for email communications, select **No**.

- Select **Yes** to allow users to select an email address preference. The email selector displays on the Communication Preferences form.

  Because Blackbaud Direct Marketing (BBDM) can honor the email address preference, it is recommended that if you use only BBDM for email communications, select **Yes** to allow email address selection.

***Note:*** If you use both Blackbaud Internet Solutions and BBDM for email communications, it is recommended that you select **No** for this option.

## New Email Opt-in/Opt-out Preferences

In an effort to offer more explicit options for online users, the email preference settings in Blackbaud Internet Solutions have been enhanced to specifically indicate whether users are opting in or opting out of email communications, or if they have no preference either way.

There are now three email preference options, Opt-in, Opt-out, and No preference, available for each communication type. This gives users the option to explicitly opt out of receiving a certain email type. Users who do not have a previously set choice in Blackbaud CRM will have their email preference options set to **No preference** by default. They can subsequently modify these preference settings on the Communication Preferences form and submit the changes.

You can use the Element tab to customize the text that displays to the users for each of the preference options. You cannot leave the text field blank for these options.

- **Opt-in**: Default text is *Send me these emails*.
- **Opt-out**: Default text is *Do not send me these emails*.
- **No preference**: Default text is *No preference set*.

## Global Opt-Out Confirmation Text

The global opt-out option allows users to opt out of all communication from your organization. We've added the ability to include text for a confirmation message that displays in red beneath the global opt-out option when users select it.

On the Element tab, use the **Global opt-out confirmation text** property to specify the text you want to display when users select the global opt-out option. The default text for the confirmation message is *You will not receive email from us*. You can edit the text to customize your message or you can leave this field blank if you do not want to display a confirmation message.

# Directory Private Email Messaging

An enhancement was made to the Directory part in Blackbaud Internet Solutions that now enables alumni and other users to send messages to others in the directory without sharing their email addresses. This functionality is available only for website users who are logged in to Blackbaud Internet Solutions; anonymous users do not have the capability to use directory messaging.

***Note:*** A website user can send a maximum of 10 messages per hour. When this limit is reached, a message displays telling them to try again later.

On the Design tab of a Directory part, select **Allow messaging between users** to enable messaging.

When you select this option, additional fields display below the option so you can configure the message's default text, including the subject, email message, from address, from name, confirmation message, and opt out message.

***Note:*** To avoid having the email rejected or considered spam, the **From address** must be an email address on a domain that the organization owns and controls. This is necessary as some email providers such as Yahoo and AOL have strict DMARC policies that reject any emails with a yahoo.com or aol.com email address that have not originated from those domains.

When messaging is enabled, an email icon ( ) displays in the directory's Messaging column for people who have a primary email address and have not opted out of messaging. To send a message, click beside the recipient's name to display the message template. You can edit the message as desired, then click **Send message** to send the email. The email is sent via the organization to the recipient, and the recipient's email address is not visible to the sender. A confirmation message displays when the email is successfully sent.

The Communication Preferences form was also updated to support opting out of receiving email messages sent from other directory users.

In **Directory messages**, select **Opt-out** to have a directory messaging opt-out checkbox display to users on their Communication Preferencesform. You can also enter text in the **Opt-out text** field on the Element tab to customize the text that displays for the option.

When users click the unsubscribe link in an email they receive via directory messaging, they are sent to their Communication Preferences form where they can select the directory opt-out option. Users can also clear this option if they had previously opted out and now want to resume directory messaging.

# Updated reCAPTCHA

When you enable *reCAPTCHA* in *Administration*, Blackbaud Internet Solutions displays a completely automated public turing test to tell computers and humans apart (CAPTCHA). With CAPTCHA functionality, the program can ensure a user is not an automated program to generate spam or phish for payment information.

Previously, the program displayed distorted text that users were required to type into a box. To simplify the experience, the program now displays a checkbox labeled "I'm not a robot." Users can select the checkbox to proceed.

***Note:*** In cases where the program cannot confidently predict whether a user is a human or an abusive agent, it will display an additional test to confirm the user is valid. For example, the CAPTCHA may display multiple images and ask the user to identify which images match a particular description.

The *reCAPTCHA* options you select in *Administration* control all parts in Blackbaud Internet Solutions except Advanced Donation Form, Event Registration Form, and Payment 2.0 parts that use the Blackbaud Secure Payments form. Those parts now include an **Additional payment fields** section on the Design tab where you can select to include *reCAPTCHA*.

When you include this option, a *reCAPTCHA* checkbox displays below credit card payment fields on your Blackbaud Secure Payments form. Users must select the *reCAPTCHA* checkbox before they can submit the form.

# URL Redirects

We've improved our URL redirect implementation in Blackbaud Internet Solutions to ensure that browser search engines correctly handle your redirected pages.

Previously, when administrators added a new redirect to forward an http URL to an https URL, a 302 redirect was created. Since 302 redirects are considered temporary, this was causing issues with the page indexing by Google's search engine.

Now, our modification to the redirect functionality creates 301 redirects, which are considered as permanent page moves. Since search engines do not penalize 301 redirects like they do with other types of redirects, your new URLs do not lose page ranks, positions in search engine results, or back links to the original URLs.

To create a URL redirect, go to *Administration* > *URL redirects*, then click **New redirect**.

# Service Pack 12

These features were introduced in Service Pack 12 after the original ***CRM 4.0*** release. For information about Blackbaud Internet Solutions new features, see Blackbaud Internet Solutions New Features.

## Recognized Donors List for Recognition Programs

To improve the usability of recognition programs in *Constituents*, we have added a Recognized Donors tab to each recognition program page. On this new tab, you can view a list of donors that have been awarded membership to the program.

## Fundraiser on the Go

*Fundraiser on the Go* is a mobile-first, responsive, web-based application for ***Blackbaud CRM***. Users who are designated as fundraisers within ***CRM***—and have the "Fundraiser" constituency—can use *Fundraiser on the Go*.

Fundraisers can access their prospect lists and more using a browser on their mobile devices. When you log into *Fundraiser on the Go*, you will see a quick list of your prospects. By clicking on a prospect's name, you can easily drill down into the details, such as contact information, spouse, and notes. For each prospect, you can also see recent and upcoming interactions and steps. You can even file contact reports and add or edit steps when you're on the go. You can also access basic information about the prospect's most recent gifts and recognition credits.

**View Frequently Asked Questions about Fundraiser on the Go**

For fundraisers to access *Fundraiser on the Go*, from *Prospects*, click **Fundraiser on the Go**. From this screen, you can copy the URL to send to users. Fundraisers can use the bookmarks or favorites functionality for the browser on their mobile devices for quick and easy access.

**Show me Fundraiser on the Go!**

# Enqueued Business Processes

With this Service Pack, we have made enhancements to how some business processes are run in ***Blackbaud CRM***. Previously, most business processes, such as acknowledgements and pledge reminders, could only be processed one at a time. This meant that if a pledge reminder business process for one site was running, the process had to finish before a user could start another pledge reminder process. With the new enqueued functionality, multiple instances of a business process type can be started and will be completed automatically, one after the next. The types of business processes that will be enqueued include the Assign Letters process, the Reminders process, and the Revenue Acknowledgements process

On the Business Processes page in *Administration*, there is now an Enqueue tab which displays all of the jobs that are enqueued. Before business processes can be enqueued, you must enter the credentials of a system administrator user that will be used to run the processes. The **Edit enqueue settings** task is on the Business Processes page in *Administration*.

# Credit Card Encryption Improvements in Enhanced Revenue Batch

In order to improve PCI compliance with credit card tokenization in Enhanced Revenue Batch, we have added an interface between ***Blackbaud CRM*** and the Bluefin® Payment Systems and their credit card encryption device. This device enables credit cards to be keyed in or swiped, subsequently encrypted and tokenized through ***Blackbaud Merchant Services*** and the ***Blackbaud Payment Service***, removing the need to store the actual credit card number at any point in the process. For more information about Bluefin Payment Systems, see https://www.bluefin.com/about/. For more information from Bluefin about the intergration with ***Blackbaud CRM***, see the Bluefin and Blackbaud Integration Guide.

The integration into Enhanced Revenue Batch includes a new **Capture card info** button on the batch toolbar to enable the integration with the Bluefin device to swipe or enter credit card details. The credit card information is tokenized with the ***Blackbaud Payment Service***.

# AngularJS Extensibility

BBUI-Angular is a library of tools designed for integration with the Blackbaud Infinity platform using an AngularJS-based web application. It is built in conjunction with SKY UX (http://skyux.developer.blackbaud.com) and allows users to build custom Angular web apps that integrate directly with ***Blackbaud CRM*** data. Find additional information and resources in our GitHub repository (https://github.com/blackbaud/bbui-angular).

# Ledger Enhancement for Pledge Payments

To enhance the granularity of your ledger postings, we have added the ability to map payments with an application type of "Committed Pledge" and "Uncommitted Pledge" in the General Ledger Setup area of Administration. A committed pledge payment is one with a status of posted or not yet posted, whereas an uncommitted pledge payment is one with a status of do not post. When you upgrade, the existing "Pledge" mapping option for payments will no longer exist and the two new pledge applications for payments will be available to be mapped. When you upgrade, existing "Pledge" payment mappings will be updated to the "Committed Pledge" mapping. This change will not trigger any ledger or payment adjustments..

# Action Lists for New Features for CRM 4.0

**Immediate Action Required** ..... 231
**Enhancements with Configuration Required** ..... 232
**Automatic Enhancements with Configuration Considerations** ..... 234
**Automatic Enhancements** ..... 236

These lists represent four basic categories of new features and functionality: features you get automatically upon upgrade, features you get automatically with default settings that you should take into consideration for your organization, features which require action on your part for them to be available, and features that require immediate action because of potential impact to existing processes.

***Note:*** These lists can help you plan for your upgrade and can help you understand where action on your part is recommended or required. These lists can also help you determine what levels of user acceptance testing you might consider for new features. These action lists do not replace the actual new feature content. You should read all of the new feature content in order to more fully understand the features and enhancements, along with what actions, if any, are recommended or required in order to take advantage of the features.

## Immediate Action Required

This list contains new features and enhancements that change the way your organization functions. Certain business processes will work differently after you upgrade and you must take action in order to continue business as usual.

**CRM 4.0 New Features**

- Upgrade Considerations: Tasks and System Roles on page 10 (if you have assigned tasks to system roles for the *Events*, *Prospects*, or *Memberships* functional areas)
- Constituent Record Redesign on page 22 (if you have customizations on the summary section or tabs of the constituent record)
- New Direct Marketing Effort Workflow on page 32
- Recurring Gift Status Changes on page 94

**Service Pack 1 New Features**

- N/A

**Service Pack 2 New Features**

- N/A

**Service Pack 3 New Features**

- N/A

**Service Pack 4 New Features**

- Blackbaud Internet Solutions Middle Name Field on page 159 (to satisfy the Canadian Revenue Agency's requirements for donation receipts)

**Service Pack 5 New Features**

- Microsoft .NET Framework 4.5.2 on page 162

**Service Pack 6 New Features**

- N/A

**Service Pack 7 New Features**

- N/A

**Service Pack 8 New Features**

- N/A

**Service Pack 9 New Features**

- AddressFinder and DeceasedRecordFinder Enhancements
- Email Security Enhancement

**Service Pack 10 New Features**

- N/A

**Service Pack 11 New Features**

- Blackbaud Data Warehouse ETL Snapshots on page 210

**Service Pack 12 New Features**

- N/A

# Enhancements with Configuration Required

This list contains new features and enhancements that are not available until additional items or settings are configured, such as explicit opt-in features or changes that require you to open and re-save records in order for the new functionality to be available. Until you take the necessary action, you will not be able to take advantage of these features and enhancements.

**CRM 4.0 New Features**

- Post Membership Installment Plans on page 50
- Added Tiles to the Search Results Grid on page 53
- New Data Sources for Prospect Search on page 58

- Research Lists on page 59
- Experian Data Source Added on page 65
- Code Table Field Values on page 73
- Open Data Protocol on page 80
- Giving List Report on page 87
- Update Recurring Gift Statuses Business Process on page 102
- Existing "Held" Recurring Gifts on page 106
- Blackbaud Secure Payment API on page 114
- Email Templates on page 119
- User Image Options Setting on page 122
- Custom Error Page on page 122
- Favicon Images on page 124
- Profile Update Form on page 125

**Service Pack 1 New Features**

- Blackbaud Data Warehouse Reconciliation Report on page 139

**Service Pack 2 New Features**

- Existing Recurring Gift Settings on page 148

**Service Pack 3 New Features**

- N/A

**Service Pack 4 New Features**

- N/A

**Service Pack 5 New Features**

- N/A

**Service Pack 6 New Features**

- Credit Card Updater Service on page 165
- Delete Constituent Images with the "Delete audit data" Global Change on page 181
- Add Constituents to a Group in Bulk on page 182
- Constituencies Performance Improvements on page 186

**Service Pack 7 New Features**

- Improved Constituent Interactions List on page 191

**Service Pack 8 New Features**

- N/A

**Service Pack 9 New Features**

- N/A

**Service Pack 10 New Features**

- Credit Card Tokenizer on page 205
- Upcoming Change for Email Forwarding on page 210

**Service Pack 11 New Features**

- Event Registration Form on page 211

**Service Pack 12 New Features**

- Fundraiser on the Go on page 227
- Enqueued Business Processes on page 229
- Credit Card Encryption Improvements in Enhanced Revenue Batch on page 229

# Automatic Enhancements with Configuration Considerations

This list contains new features and enhancements that are available upon upgrade with default settings, but do require additional configuration to fit your organization and business processes.

**CRM 4.0 New Features**

- Online Help Panel on page 11
- Constituent Merge Configuration for Employment History on page 30
- File Uploads on page 43
- List Builder on page 44
- Export Limit in Query on page 73
- Manage Exports on page 75
- Anonymous Recognition Options on page 89
- Parts on page 114
- Language Tab Changes on page 115
- reCAPTCHA Failed Message on page 115
- Default Value for Drop Down Fields on page 116
- eCards on page 117
- Transaction Manager on page 118
- User Login Part: Constituent Attributes on page 198

**Service Pack 1 New Features**

- Password Reset Page Link on page 125
- Enhanced Contribution Criteria for Membership Programs on page 128
- Update Only Addresses with NCOA Changes on page 129
- Amendments for Recurring Gifts on page 131
- Payment Methods for Recurring Gifts on page 131

- Skip Recurring Gift Installments on page 133
- New Social Media Finder Service for WealthPoint on page 133
- New Queries from the Blackbaud Data Warehouse on page 139

**Service Pack 2 New Features**

- Database Growth Management on page 140
- Recurring Gift Payment Handling on page 143
- Next Installment Date Calculation on page 147
- Opportunities Tile on Constituent Records on page 149
- Customize KPI Dashboard on page 151
- Profile Update Form on page 155

**Service Pack 3 New Features**

- Block Sending Email Messages and Scheduled Email on page 157
- Prospect Status Tile on Constituent Records on page 158
- Pending Activity List Builder on page 158

**Service Pack 4 New Features**

- Blackbaud Internet Solutions Middle Name Field on page 159
- PeopleFinder Phone Number Enhancements on page 160
- Constituent Tile SDK Enhancements on page 161

**Service Pack 5 New Features**

- Delete Email Messages and Newsletter Issues Permanently on page 162

**Service Pack 6 New Features**

- Blackbaud Secure Payment Page Upgrade on page 174
- Anonymous Gift Information in Payment 2.0 Parts on page 176
- Masked Account Number Field in Queries on page 176
- Correspondence Processes for Households and Members on page 176
- Sort Order for Reciprocal Relationship Types on page 177
- PhoneFinder and Do Not Mail Addresses on page 178
- Improved Matching in the Incremental Constituent Duplicate Search Process on page 179
- Organization Setting: Non-Production Environment Checkbox on page 180
- Educational Institution Enhancement in Constituent Query on page 181

**Service Pack 7 New Features**

- Invitee and Invitation Information in Constituent Query on page 191
- Recurring Gift Status Information in Query on page 192
- Smart Field Categories on page 193
- Improved Options for Global Marriage Settings in Constituents on page 194

**Service Pack 8 New Features**

- Delete Email Messages and Newsletter Issues Permanently Update on page 196

**Service Pack 9 New Features**

- Title Settings on page 198
- User Login Part: Constituent Attributes on page 198
- Email Address Type Field on page 199

**Service Pack 10 New Features**

- Additional Recurring Gift Information in the Data Warehouse on page 206
- Additional Education Information in the Data Warehouse on page 206
- Confirm Email Address Field on page 208
- Security Update on page 208

**Service Pack 11 New Features**

- Blackbaud Data Warehouse ETL Snapshots on page 210
- Appeal and Campaign Tracking for Events on page 218
- Communication Preferences Form Enhancements on page 220
- Directory Private Email Messaging on page 223
- Updated reCAPTCHA on page 225
- URL Redirects on page 226

**Service Pack 12 New Features**

- AngularJS Extensibility on page 230
- Ledger Enhancement for Pledge Payments on page 230

# Automatic Enhancements

This list contains new features and enhancements that are available upon upgrade without any additional settings or configuration required.

**CRM 4.0 New Features**

- Upgrade Considerations: Tasks and System Roles on page 10 (if you have not assigned tasks to system roles for the *Events*, *Prospects*, or *Memberships* functional areas)
- Save As Option for Export Definitions on page 14
- Filter the Organization Calendar by Event Tasks on page 15
- Column Widths in Batches on page 16
- Edit Recognition Credits in Batch on page 16
- Apply to Commitments Screen in Batch on page 17
- Action Bar for a Batch Row on page 18

- Constituent Record Redesign on page 22 (if you do not have customizations on the summary section or tabs of the constituent record)
- Constituent Search on page 26
- Campaign Filters for Constituent Revenue and Recognition Information on page 27
- Letter Owner on page 28
- Specific Date Range Filters on the Revenue and Recognition History and Summary Tabs on page 29
- Blackbaud Data Warehouse on page 31
- Manage Attribute Categories and Smart Fields on page 32
- Changes to Navigation in Marketing and Communications on page 38
- Changes to Marketing Effort Records on page 40
- Enhancements to Marketing Business Processes on page 42
- Partially Pay for Events with Designations on page 42
- Data Lists on page 43
- Exports to Excel on page 45
- Rearrange Tabs on page 45
- Customize Home Page on page 45
- Navigation Tree on page 46
- Batch and Import Guide Enhancements on page 47
- Search for Members on page 49
- Membership Installment Plans on page 49
- Partially Pay for a Membership Installment on page 51
- Membership Gift Status on page 52
- Membership Dues Revenue Report on page 52
- Simplified the Add New Individual Screen on page 55
- Add New Prospect from Search Page on page 55
- Enhanced the Advanced Search on page 56
- New Advanced Search Filters on page 57
- New Record State Column for Real Estate Assets on page 66
- Track Solicitors on Opportunities on page 69
- Delete Constituents with WealthPoint History on page 71
- Additional Prospect Research Tracking Information Added to Query on page 71
- Information Library on page 72
- View Query Results on Save on page 74
- View Exports Associated with a Query or Selection on page 74

- Create Export from a Selection on page 74
- Query Source Views for Business Processes on page 75
- Make Queries or KPIs Favorites from the Query or KPI Record on page 77
- Save As Option for Query on page 77
- Constituent Query from the Data Warehouse on page 78
- Date Criteria Operators on page 83
- New Active Users Query Source View on page 85
- Pledge Installments on page 86
- Recurring Gift Record Redesign on page 91
- Batch Lockdown for Credit Card Processing on page 107
- Credit Card Reconciliation on page 107
- Internet Explorer 11 Support on page 112
- Image Library on page 113
- Directory on page 116
- Communication Preferences Form: Active Email Addresses on page 125


**Service Pack 1 New Features**


- Part Removal Safeguard on page 123
- Social Media Login Welcome Email on page 126
- Save and Close Options for Query on page 127
- Save and Close Options for Export Definitions on page 127
- Date Field Changes for Data List Exports to Excel on page 128
- CoreLogic Property Valuation Update on page 138
- Additional Target Analytics Data Updates on page 139


**Service Pack 2 New Features**


- Pledge Installment Improvements on page 142
- Add and Edit a Recurring Gift Payment on page 145
- Recurring Gift Activity Timeline on page 147
- Expand and Collapse Query Folders on page 150
- Performance Improvements for Group WealthPoint Screenings on page 151
- Invitation Lists on page 152
- Relationship Label for Additional Members in Membership Dues Batches on page 157


**Service Pack 3 New Features**

- N/A

**Service Pack 4 New Features**

- BBIS Event Registration Transaction Batch: Donor Option on page 159
- Documentation Enhancement: Dependencies on Audit Tables on page 161

**Service Pack 5 New Features**

- Advanced Donation Form - Pledge Installments API on page 164

**Service Pack 6 New Features**

- Mark Constituencies Inactive on page 183
- Donor Constituency Criteria on page 184

**Service Pack 7 New Features**

- Refund Details on page 188
- Constituent Summary Tiles Enhancement on page 193
- Search for Constituents by Site on page 193

**Service Pack 8 New Features**

- Email Settings on page 195

**Service Pack 9 New Features**

- Appeals for Payments in Enhanced Revenue Batch
- Add Constituent Attribute Global Change Enhancement
- Integration Services Setting: Number of Records to Update on page 201
- Sending a Final Email on page 199

**Service Pack 10 New Features**

- Link Additional Revenue Types to Major Giving Opportunities
- Credit Card Updater Query Enhancements
- Giving List Enhancement to Include Recognition Credits on page 205
- Attributes for Appeals, Sponsorships, and Financial Transaction Line Items on page 205
- Email Performance Statistics Enhancements on page 207
- JQuery Version Upgrade on page 209
- Support for International State Fields on page 209

**Service Pack 11 New Features**

- Locations for Constituent Interactions and Major Giving Plan Steps on page 211
- AddressFinder and the New Digital Processing Acknowledgement Form on page 211

**Service Pack 12 New Features**

- Recognized Donors List for Recognition Programs on page 227