

Friends Asking Friends New Features Guide

2/4/2013 Friends Asking Friends 2.96 Friends Asking Friends New Features US

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Blackbaud Friends Asking Friends New Features

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This guide provides an overview of new features and enhancements for the Blackbaud Friends Asking Friends changes available in the 2.96 release. For information about how to install or update to this version, see the *Infinity Platform and Upgrade Guide*.

Friends Asking Friends Event Website

The following event website enhancements are available.

Social Media Sharing Changes

Friends Asking Friends websites now use the latest social media sharing technology from *Janrain*, our third party authentication and social sharing service. The changes include new easy to use sign-in and social sharing interfaces.

Note: To create custom interfaces, you must login to your *Janrain* account and configure them. Previous sharing screen configurations do not appear after the 2.96 upgrade. For configuration information, see steps nine and ten of the Create social media application and configure *Janrain* settings topic in the CMS *Administration Guide*.

The updated social sign-in interface is now configurable. You can select the layout settings, sign-in providers, and styles to use where the social media sign-in icons appear. Previously, the sign-in options used a default configuration.

SIGN UP OR SIGN IN

You will need an account to complete your registration and get your personal fundraising page.

Create account or login:

Email address: *

Login with my account from last year

Password: *

Confirm password: *

Use your login from:

Sign in using your account with

Aol. AOL Google
Yahoo! OpenID
Twitter Facebook

Powered by Janrain

The new customizable sharing screen allows users to create messages for multiple social networks simultaneously. Users can change the view on the screen to access the message for each social network before sharing. The previous interface required users to create messages for each network individually. The screen appears when website users post activities such as registrations and donations from your site to their social networks.

Facebook Twitter Yahoo! powered by Janrain

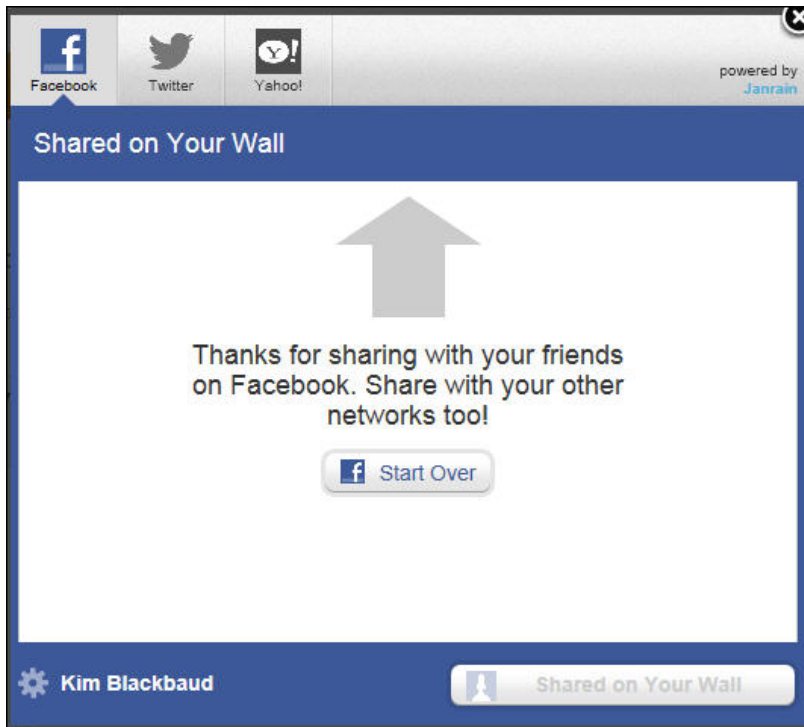
Share On Your Wall

I donated \$100.00 to Walk for Hope 2012 Detroit in support of Walk for Hope 2012 Detroit. Please join me in supporting Walk for Hope 2012 Detroit too.

 **Please support Walk for Hope 2012 Detroit**
<http://faf4.hostingtest.com/WalkforHope2012Detroit/Page...>
** Your organization's mission here

Kim Blackbaud Share On Your Wall

After a user posts a message to one network, a message appears and encourages them to post to others.

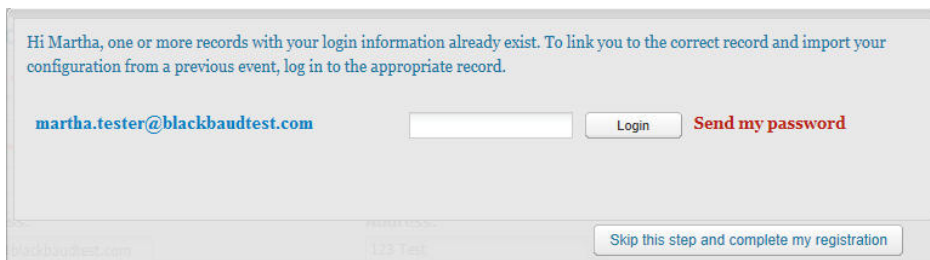


Step Properties and Configurable Automatch

The new Step tab in the **Properties** pane on forms displays properties for the step selected in the design area. From the **Value** column, you can enter text for the **Label** property to appear as the step name.

For steps within registration forms, you can use the **Value** column to select whether to enable automatch for the **Run automatch** property. **Run automatch** allows you to specify when to check whether a website user already exists in your database.

By default, automatch is enabled in the first step of the form to identify returning users by email address or username. When users enter new login details, another default automatch is performed in the profile step. When the program identifies potential duplicates, users are presented with a screen from which they can login to their previous account.



The program performs automatch checks once per step to provide a seamless end user experience. For example, if a user completes the form then returns to the profile step from the review step, the program does not perform another automatch check from the profile step. This allows the user to quickly update information and complete the registration.

Tip: We recommend you enable automatch on or after a step in which you capture user profile information.

Note: The **Run automatch** option is not available for the review step.

The screenshot shows a software interface with a navigation bar at the top containing tabs: 'Get started', 'Registration', 'Profile' (selected), 'Fundraising', and 'Donate'. Below the navigation bar is a 'YOUR PROFILE' form with fields for 'First name', 'Last name', 'Address type', and 'Country'. To the right of the form is a 'Properties' table with three tabs: 'Form', 'Step', and 'Element'. The 'Element' tab is selected and circled in red. The table contains the following data:

Name	Value
Label	Profile
Run automatch	Yes

Friends Asking Friends Event Management

The following event management enhancements are available. For more information, see the Friends Asking Friends Event Management chapter of the *Friends Asking Friends Guide*.

Add an Offline Gift

From the Donations tab of an event record, you can now quickly add offline gifts such as when donors mail checks to your organization or provide you with credit card information by phone. To enter one-time gifts, pledges, or recurring payments, click **Add** and use the Add a Gift screen.

Tip: We recommend you complete the form from left to right, top to bottom, because the form changes according to the selections you make at the beginning.

The screenshot shows the 'Donations' tab of a software interface. The 'Donations' count is 93. There is a '+ Add' button circled in red, along with other icons for search, columns, save list, and open list. Below the search bar are filters for 'Donor name', 'Recognition', and 'Amount'. A list of donors is partially visible at the bottom, including 'Martha Tester' and 'Joe Smith'.

The screenshot shows the 'Gift summary' form. It is divided into several sections:

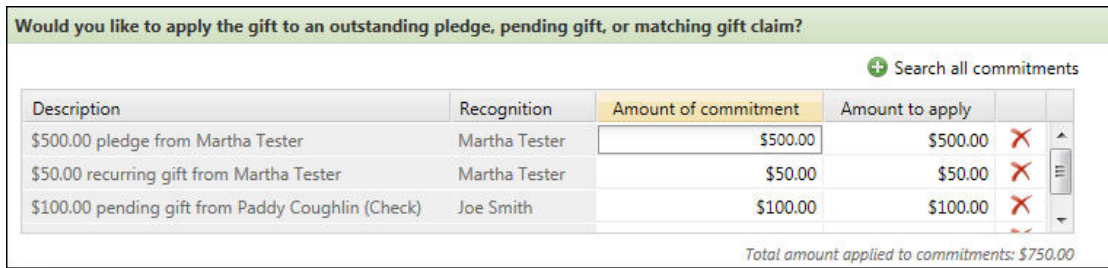
- What is the gift type?**
 - One-time gift or payment
 - Pledge
 - Recurring gift
- How much is the gift?**
 - Amount:
 - Gift is anonymous
- Who is making the gift?**
 - Constituent:
 - 123 Test
 - Test, CA 92121
 - (No phone) | kimberly.bartell@blackbaud.com
- Who gets credit for the gift?**
 - Gift recognition:
- Would you like to apply the gift to an outstanding pledge, pending gift, or matching gift claim?**
 - 2 commitments found for Martha Tester
 - 2 pending gifts found for Joe Smith
 -

When you add gifts, you select a constituent to associate with the payment and a participant or fundraising group to receive recognition. If you do not indicate the gift recognition, the program credits it to the event. After you select a constituent as the donor, the contact details and a pencil icon appear below the field. If necessary, you can click the icon to edit the donor constituent record.

For one-time gifts, links appear when open gifts exist within the event for the donor or constituent to receive recognition. Open gifts, or commitments, can include pledges, pending gifts, recurring gifts, and matching gifts.

Note: Open gifts for constituents to receive recognition only include pending gifts.

To apply the current gift to open gifts, click a link and select the records from the new screen. When you return to the Add a gift screen, the records appear in a grid that includes the open gift information. From the grid, you can update the commitment and application amounts.



Note: If the current gift amount exceeds the open gift amounts you select, the program creates a donation for the remainder and credits it to the participant or fundraising group you select to receive the recognition. If you apply the total current gift amount toward an open gift, you do not need to select the recognition.

Next, enter payment information and additional details about the gift. The table below includes the details you can enter for each gift type.

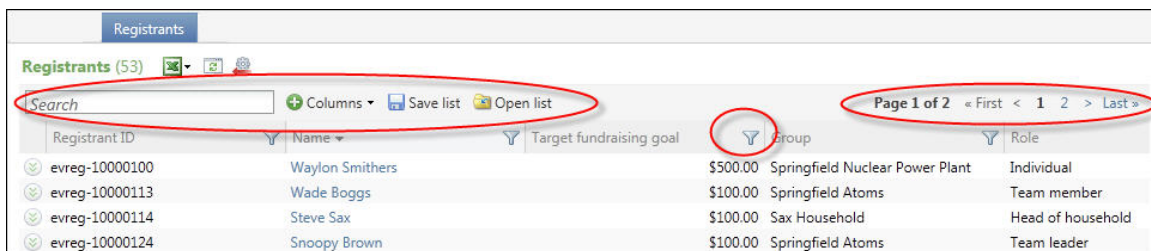
Note: Payment fields are available for one-time gifts and recurring payments.

Gift type	Gift details
One-time gift	Tribute, Matching Gift, Attribute
Pledge	Tribute, Attribute
Recurring payment	Attribute

Tributes indicate whether the donor is giving the gift in honor or memory of another person and provide the option for messages to appear on participant personal pages, attributes provide additional detail about the donor or gift, and matching gifts create commitments for organizations that donate when their employees submit a gift.

Data Lists

The data lists that appear on the Donations and Registrants tabs are now more flexible and easy to use. The changes allow you to better segment and review records.



You can now:

- Use pagination to view the entire list of donors or registrants. Previously, only 500 records were available from the tabs.
- Select the filter icon in a column header to filter the data. Previously, filter options appeared above the list.

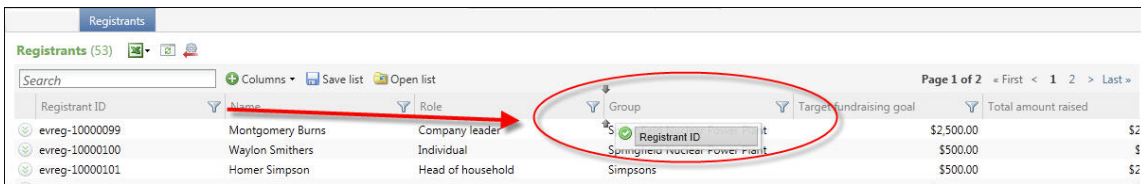
Based on the data in the column you filter, you enter your criteria. For example, for a date-based column, you can enter date criteria, such as all donations after 11/1/2012. For name-based columns, you can enter the name for which you want to filter, such as all registrants with the last name Williams.

- Click **Columns** to select the columns to use. A screen appears for you to select which columns to show and hide. Use the **Search** field to quickly find a column by name.

Note: For a complete list of columns, use the Donations and Registrants lists under **Reports**.

Tip: We recommend you use lists to find and manage records, and reports to track, manage, and evaluate the effectiveness of your event.

- Reorganize the grid. To move a column, select and hold the header and then drag and drop it to the left or right.



Tip: After you make desired changes, we recommend you save your list for future access. You can save as many lists as you need.

- Find specific records with a new **Search** field.

Note: The program uses your criteria to only search the first 500 records that display for the list. To narrow the results before you search, we recommend you first use the column filters.

- Click **Save list** to save the changes you make to a list. On the Save list screen, enter a name and description to help identify the list and then click **Save**.
- Click **Open list** to open a saved list. On the Open a list screen, click the name of the list. To narrow the lists that appear, search for the list by name.

