

RE-LO New Features Guide

05/06/2016 The Raiser's Edge 4.5 RE-LO New Features US

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New Features and Enhancements

This guide provides an overview of all the new features and fixes in the **Luminate Online** and **The Raiser's Edge** integration.

May 2016 Release

With this release, you can set Luminate Online fund limits and update primary contact information imported from Luminate Online.

Luminate Online Fund Limits Option

A new **Settings** option has been added to the **Luminate Online** Options screen accessed from RE > Luminate Online > Options pop-up. This option allows you to set a fund limit between 501 – 10,000. The default limit in the **Fund limit** field is set to "0." This default setting points the application to the Webservices Web configuration file first. If a value is set in Webservices, it is used; if no value is set in Webservices, the application sets the default to 500.

Should you enter a value not allowed, 1 - 500 or greater than 10,000, a warning screen appears. Clicking **OK** on the warning screen reverts the limit back to the previous valid value and closes the **Luminate Online** Options screen.

Upload Import Corrections through Service Bus

When errors are encountered during Raiser Edge to Luminate Online imports, Blackbaud's customer support team remedies the errors externally and then provides users the corrected external document. Once you receive the document from Blackbaud, you can import it into your system to complete the Raiser's Edge to Luminate Online import.

► Upload RE to LO import corrections from Blackbaud

1. Save the Blackbaud-provided file locally.
2. Go to **Luminate Online > Options pop-up > Tools**.
3. Click **Open**, and map to the Blackbaud file you saved locally.
4. Click **Open**.
5. The file imports and automatically corrects the Raiser's Edge files that failed to import and then moves those files into Luminate Online.

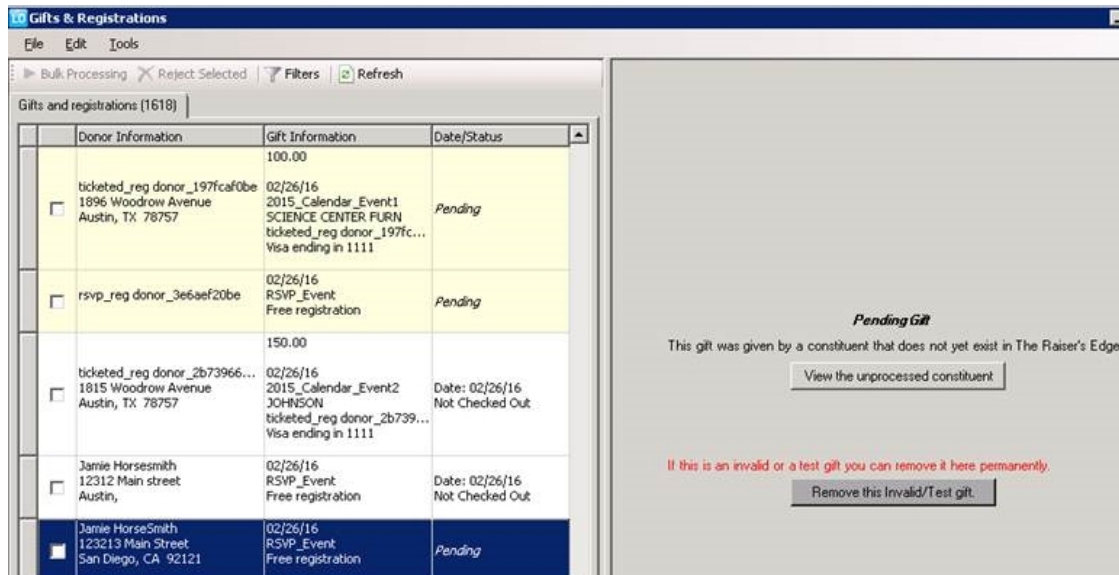
March 2016 Release

With this release, you can now reject pending gifts and registrations that are not linked to a valid constituent.

Reject Pending Gifts and Event Registrations

You can now reject pending gifts and event registrations that are not linked to a valid constituent in [[[Undefined variable BB_Variables.CRMProductName]]] with the **Remove this invalid/test gift** button. This button is enabled when a gift or event registration is selected that is not linked to an active constituent record. This feature is not available for all gifts.

Note: Once a gift or registration is removed, it is permanently removed from view in the plug-in. If you remove one by mistake, resend it from Luminate Online.



February 2016 Release

With this release, **The Raiser's Edge** and **Luminate Online** integration now respects business rules set for duplicate contact information set in **The Raiser's Edge**. Updates were also made to surface **Luminate Online** user names on the Constituent Information screen, as well as optimization for faster loading time.

Warning: [[[Undefined variable BB_Variables.CRMProductName]]] and **Luminate Online** integration will not automatically update for customers who host their own database in [[[Undefined variable BB_Variables.CRMProductName]]]. You must manually update the integration. For instructions, see <https://kb.blackbaud.com/articles/Article/66545>.

Business Rules for Duplicate Contact Information

To prevent duplicate contact information on constituent records in **The Raiser's Edge 7.95**, you can set a business rule to disallow multiple phone numbers and email addresses of the same type to be saved. The phone and email options business rule is flexible so that you can set different rules for phone numbers and email addresses. You can also set the rule to allow duplicate types if you prefer, or display a warning each time a duplicate type is about to be saved.

Based on the rule you set in **The Raiser's Edge**, the integration with **Luminate Online** will behave accordingly.

Do not allow record to be saved

If the business rule in `[[[Undefined variable BB_Variables.CRMProductName]]]` is set to not allow duplicate phone and email types to be saved, you will be prompted with a message on the Constituent Information page when you try to process changes from **Luminate Online** that include duplicates. You can select to overwrite the duplicate information in `[[[Undefined variable BB_Variables.CRMProductName]]]`, or discard the information from **Luminate Online**. If there are multiple phone numbers or email addresses with the same type on the constituent record, you can select to manually update it instead.

Note: When bulk processing constituent updates from **Luminate Online**, records with duplicate information will not be processed. Those records will remain on the Constituent Information screen for you to manually review and process into **The Raiser's Edge**.

Display warning

If the business rule in **The Raiser's Edge** is set to display a warning when duplicate phone and email types are going to be saved to a record, you will be prompted with a message on the Constituent Information page when you try to process changes from **Luminate Online** that include duplicates. You can select to add the duplicate information from **Luminate Online** to the record, overwrite the existing information on the record, or reject the update entirely.

Save record anyway

If the business rule in **The Raiser's Edge** is set to save records with duplicate phone and email types, all constituent updates from **Luminate Online** will be processed as normal, without warnings for duplicate information. We recommend you select this option with **The Raiser's Edge** and **Luminate Online** integration.

Note: When bulk processing constituent updates from **Luminate Online**, if the business rule in **The Raiser's Edge** is set to display a warning or save the record anyway when duplicate types are encountered, duplicate information will be added to **The Raiser's Edge**.

Constituent Information Page Optimization

We have optimized the Constituent Information page to load faster when a high number of constituent updates are being sent over from **Luminate Online**.

Regardless of the threshold for you set on the Options screen for number of constituents to display at a time, every constituent is filtered through your matching criteria.

Note: The maximum number of updates you can display at once is 10,000.

Luminate Online Username

When you process constituent updates from **Luminate Online**, the constituent's username now transfers to **The Raiser's Edge** as an alias. Previously, if a pre-existing **Luminate Online** constituent created a new registration for themselves with a new username, the new username would be discarded when the duplicate records were merged on the Constituent Information page of the integration in **The Raiser's Edge**. Now, when merging duplicate records, you can see each username and manually select the one to keep. After you select the username to keep and process the record into **The Raiser's Edge**, the **Luminate Online** record will be updated with the appropriate username.

Note: When using merge inside of **The Raiser's Edge**, the **Luminate Online** username is not displayed.

Below is a screenshot of the username as it appears on the Aliases screen on the Bio 1 tab of the constituent record in *The Raiser's Edge*.

Below is a screenshot of the username as it appears on the Attributes tab of the constituent record in *The Raiser's Edge*.

Manual Update for On-Premise Users

With the January release, *The Raiser's Edge* and *Luminate Online* integration will not automatically update for customers who host their own database in *The Raiser's Edge*.

For instructions on how to update the integration, see <https://kb.blackbaud.com/articles/Article/66545>.

September 2015 Release

With the September release, new or updated contact information from *Luminate Online* now appears on the Biographical tab on the Luminate Online page in `[[[Undefined variable BB_Variables.CRMProductName]]]`.

Contact Information in The Raiser's Edge

When contact information, such as phone numbers and email addresses, are added or updated on a constituent record in *Luminate Online*, that information now appears on the Biographical tab of the Luminate Online page in `[[[Undefined variable BB_Variables.CRMProductName]]]`. Previously, contact information appeared on the Addresses tab when you processed the constituent.

August 2015 Release

With the August release, you can now transfer calendar event information from *Luminate Online* to `[[[Undefined variable BB_Variables.CRMProductName]]]`. This includes set up of the event itself, as well as event registrations. Survey data from calendar event and TeamRaiser donation forms also now transfers to `[[[Undefined variable BB_Variables.CRMProductName]]]`.

Calendar Event Integration

On the Events configuration page in *Luminate Online*, you can now cross reference calendar events with your events in *The Raiser's Edge*.

When you create your calendar event in **Luminate Online**, you can also use event mirroring to select an event that already exists in **The Raiser's Edge** to copy. Any campaigns associated with the event in **The Raiser's Edge**, as well as price types, will persist to your event in **Luminate Online** after you select to mirror it.

Note: When creating a *new* Calendar Event in Luminate Online, *do not copy* an existing Calendar Event that was created using Event Mirroring. Instead, create the new event in The Raiser's Edge and then use Event Mirroring to build the new one in Luminate Online. When Calendar Events are mirrored in Luminate Online from The Raiser's Edge, there are data elements specific to that event that will *not* apply to new Calendar Events created within Luminate Online.

After you configure cross references or mirror your **Luminate Online** event with an event in **The Raiser's Edge**, calendar event registrations and associated donations flow to the Luminate Online page in **The Raiser's Edge** to be processed into your database. After you process the registrations and commit the batches that contain associated gifts, that information appears on the constituent record, as well as on the event and registrant records.

On the registrant record in **The Raiser's Edge**, participation types appear on the Registration Fees tab, as well as information such as number of units purchased, gift amount, and the date of the purchase.

If the event registration form in **Luminate Online** contains survey questions, the question and the constituent's answers appear on the Attributes/Notes tab of the registrant record. Survey questions are truncated at 50 characters, and answers are truncated at 255 characters.

Note: Only survey questions on TeamRaiser and calendar event donation forms transfer to **The Raiser's Edge**.

Event Mirroring

Rather than create a new event in **Luminate Online**, you can select to mirror an existing event in **The Raiser's Edge**. Any campaigns and price types associated with the event in **The Raiser's Edge** will persist to your event in **Luminate Online** after you select to mirror it.

After you create an event in **Luminate Online** by mirroring an event in **The Raiser's Edge**, you can only manage certain aspects of the event in each program. In **The Raiser's Edge** you can adjust event start and end times, dates, and price types. In **Luminate Online**, you can edit additional information that appears on donation forms for the event, create survey questions, and configure additional cross-references to **The Raiser's Edge**, such as funds and appeals.

Note: After events are mirrored, any update to the event in **The Raiser's Edge** requires that you edit the event in **Luminate Online** to pull in the updates.

If a campaign was already associated with the event when it was created in **The Raiser's Edge**, that information automatically appears on the event record in **Luminate Online**. You can change the campaign in **Luminate Online** if you wish, but that change will not transfer to **The Raiser's Edge** event record. We recommend that you keep the cross-references consistent.

Note: When creating a *new* Calendar Event in Luminate Online, *do not copy* an existing Calendar Event that was created using Event Mirroring. Instead, create the new event in The Raiser's Edge and then use Event Mirroring to build the new one in Luminate Online. When Calendar Events are mirrored in Luminate Online from The

Raiser's Edge, there are data elements specific to that event that will *not* apply to new Calendar Events created within Luminate Online.

Cross-reference Events

If you have events in **Luminate Online** and **The Raiser's Edge** that were already configured before the July release, you can manually cross-reference them. After you cross-reference events, calendar event registrations and associated donations flow to the Luminate Online page in **The Raiser's Edge** to be processed into your database.

Cross-Reference Ticket Types

After you cross-reference your events, you must also assign cross-references from each ticket type in **Luminate Online** to a price unit in **The Raiser's Edge**. Each ticket type in **Luminate Online** should correspond to an event price unit configured on the event in **The Raiser's Edge**.

Process and Open

When you process constituents into **The Raiser's Edge**, you can now click the **Process and Open** button to immediately open the constituent's record after it is processed.

Gift Filters

You can now filter gifts based on credit card type, and gifts that contain tribute information.

Field Mapping

The **First Name** and **Last Name** billing fields on **Luminate Online** event registration forms now map to the **Cardholder** field on the gift record in **The Raiser's Edge**.

March 2015 Release

With the March release, you can now view external gift summary information for your constituents in **Luminate Online** with gift data from **The Raiser's Edge**. Enhancements to gift filtering options were also made, as well as some updates to the way contact information is processed into **The Raiser's Edge** to accommodate the release of **The Raiser's Edge 7.94**.

External Gift Summary Fields in Luminate Online

Gift information from **The Raiser's Edge** now appears in the external gift summary fields on constituent records in **Luminate Online**. The information in these fields is populated each time a new gift or a change to the constituent record is made in **The Raiser's Edge**.

Rather than manually make changes to each of your records in **The Raiser's Edge** so that the gift summary fields populate in **Luminate Online**, we recommend you make changes to records based on your normal segmentation, and generate gift summary information as you need it.

The gift types that are used to calculate the gift summary information are the same as the gifts included in the Summary Information fields in **Query** in **The Raiser's Edge**: Cash, Pledge, Matching Gift Pledge, Stock/Property, Gift-in-Kind, Recurring Gift Pay-Cash.

ACH Status Gift Filters

You can now filter gifts on the Luminate Online page in **The Raiser's Edge** based on their ACH status. You can select to view gifts in the grid based on if they are settled or unsettled ACH transactions.

Process Contact Information from Luminate Online

To accommodate changes to the way contact information is stored in **The Raiser's Edge 7.94**, the integration no longer overwrites any contact information when it is downloaded from **Luminate Online**. For example, if a constituent donates through **Luminate Online**, and provides a new email address, you can no longer overwrite the existing email address when you download that information into **The Raiser's Edge**.

When you process contact information from **Luminate Online** into **The Raiser's Edge**, you have a few options:

You can update the preferred information in **The Raiser's Edge** with the downloaded information from **Luminate Online**, add the downloaded information as a new piece of contact information for the constituent, or add the downloaded information as new contact information and mark it as the new preferred information on the record.

You can update the preferred information in **The Raiser's Edge** with the downloaded information from **Luminate Online**.

When you select this option, the information in **The Raiser's Edge** is no longer overwritten. Instead, the new information from **Luminate Online** appears at the top of the contact information list on the constituent record. If the new contact information type matches the type of the existing primary information, the new information is marked as primary.

When you download contact information from **Luminate Online**, you can also choose to add it as new information on the Bio 1 tab.

When you select this option, the new contact information appears on the bottom of the contact information grid on the Bio 1 tab of the constituent record.

When you download contact information from **Luminate Online**, you also have the option to add it to **The Raiser's Edge** as new information, and mark it as primary.

When you select this option, the new information from Luminate Online appears at the top of the contact information list on the constituent record. If the new contact information type matches the type of the existing primary information, the new information is marked as primary.

February 2015 Release

The February release contains a number of enhancements for processing constituents and gifts, such as more filter options for donations, and the ability to filter your list of constituent updates. There have also been a number of performance enhances which should improve load times across the integration in **The Raiser's Edge**.

Constituent Filters

To help organize the constituent updates that come from **Luminate Online** into **The Raiser's Edge**, and process them in a more organized fashion, you can now filter them based on date and if the constituent also has a pending gift transaction.

The filters you set apply to the information on every tab of the Constituent Information grid.

Filter Gifts by Online and Offline Transactions

You can now filter gifts based on if they were added behind the scenes by a **Luminate Online** administrator, or by the donor through an online donation form. By default, both the **Online transactions** and **Offline transactions** checkboxes are selected. Select the information you want to appear, then click **Apply** to view the updated transactions.

Payment Type Transaction Count

Gift filters now display the transaction count per payment type. This allows you to get more information up front before you apply any filters.

Integration Performance Updates

A number of performance enhancements have been made to the integration inside of ***The Raiser's Edge***. This should improve load time and processing time across the entire integration.

Tribute Enhancements

In the February release of ***The Raiser's Edge*** and ***Luminate Online*** integration, a few enhancements were made to the way tribute gifts transfer from ***Luminate Online*** to ***The Raiser's Edge***.

Gift Aid Compatibility for UK Clients

Donations made in ***Luminate Online*** that qualify for Gift Aid now transfer to ***The Raiser's Edge*** with the appropriate Gift Aid information.

January 2015 Release

With the January release, you can now cross-reference TeamRaiser events in ***Luminate Online*** with events in ***The Raiser's Edge***. This allows you to more accurately track TeamRaiser event registrations and gifts in both systems.

For clients who host their own database in ***The Raiser's Edge***, you now install and update *Blackbaud Web Services* from the Web Services console in ***The Raiser's Edge***.

Team Raiser Event Integration

On the TeamRaiser configuration page in ***Luminate Online***, you can now cross reference your TeamRaiser events with your events in ***The Raiser's Edge***. After you configure cross references, TeamRaiser registrations and associated donations flow to the Luminate Online page in ***The Raiser's Edge*** to be processed into your database.

After you process the registrations and commit the batches that contain associated gifts, that information appears on the constituent record, as well as on the event and registrant records.

On the registrant record, participation types appear on the Attributes tab, as well as information such as team name, if the constituent is a team captain, and the URL of the page on which the constituent registered.

Update Web Services for On-Premise Clients

For clients who host their own database in *The Raiser's Edge*, you can now update *Blackbaud Web Services* from the Web Services console inside *The Raiser's Edge*. If an update is available, the Install Update link will be active in the **Blackbaud Web Services** line.

From the Configuration Options screen, you can also start and stop the service as necessary with the play and stop buttons, as well as uninstall the service.

Edit Tribute Gifts

From the Gifts and Registrations screen, you can now edit tribute gifts and navigate away to another gift without losing your changes. This allows you to edit tribute gifts as necessary, such as to link to an existing tribute, and then process multiple gifts at once with bulk processing.

RETransactionID Field for Blackbaud Merchant Services

The RETransactionID now appears on the gift record for any gifts processed using *Blackbaud Merchant Services*. You can use the RETransactionID to reconcile your *Blackbaud Merchant Services* payments.

November 2014 Release

The November release includes enhancements to gift processing, and an auto-update process that runs each time you open the Luminate Online page in *The Raiser's Edge* to ensure you have the most current version of the integration.

To help you process gifts from *Luminate Online* into *The Raiser's Edge*, you can now organize and filter donations. On the Gift and Registrations screen, you can now view all gifts given by new constituents who have not yet been downloaded from *Luminate Online* into *The Raiser's Edge*.

The home page of the integration has also been updated to be more visually appealing and descriptive.

Gift Filters

To help organize the gift batches you create, and process gifts in a more organized fashion, you can now filter all donations from *Luminate Online*.

You can filter gifts by date, payment type, appeal, fund, and event. By filtering gifts, it allows you to easily focus on processing only certain types of gifts, so that your batches contain only the donations you want them to.

Pending Gifts

When a new constituent makes a donation through **Luminate Online**, you have to download their constituent information into **The Raiser's Edge** before you can process their gift. Previously, the donation would not appear on the Gifts and Registrations page until the constituent was in **The Raiser's Edge**. Now, when you access the Gifts and Donations page, all gifts for new constituents appear, and are marked as *Pending*.

You can click **View the unprocessed constituent** to go directly to the Constituent Information screen and process the record into **The Raiser's Edge**.

Auto Updater

When you access the Luminate Online page in **The Raiser's Edge**, your system automatically checks for updates to the integration. If an update is found, it is automatically applied. This ensures you are always using the latest version of the integration.

For clients who host their own database in **The Raiser's Edge**, this process only updates the **The Raiser's Edge and Luminate Online integration**. It does not update *Blackbaud Web Services*. To update *Blackbaud Web Services*, you must run the **lumonlineintegrat.exe** file that is sent to you.

Note: The first time the auto updater runs, you will need to close **The Raiser's Edge**, then re-open it for the updates to appear.

Home Page

The home page of **The Raiser's Edge and Luminate Online Integration** has been updated to be more visually appealing and descriptive. The Options menu has been changed from a link in the top-right corner, to a button in the main part of the screen.

June 2014 Release

You can now select to process new constituents, or updates to linked constituents, from **Luminate Online** automatically into **The Raiser's Edge**.

Automatic Processing for Constituent Information

Rather than manually review new or updated constituent information from **Luminate Online**, you can now process that information automatically into **The Raiser's Edge**.

From the Luminate Online Options page in **The Raiser's Edge**, you can select to automatically process new constituents from **Luminate Online** directly into **The Raiser's Edge**, updates to constituents that are already linked to a constituent in **The Raiser's Edge**, or both. This means that when a new constituent, or updates to an existing constituent are added through **Luminate Online**, that information will automatically appear in **The Raiser's Edge**.

When you select to automatically process updates to linked records, you can choose to exclude certain constituents from being automatically processed based on a query. Those constituents will be put onto the Constituent Updates page for manual review.

If a new constituent from **Luminate Online** is matched to a constituent in **The Raiser's Edge**, they will be put onto the Constituent Updates page for manual review, so that you can determine if the records should be linked, or if the new constituent should have their own record in **The Raiser's Edge**.

You can turn automatic processing on or off at any time.

April 2014 Release

When you download constituent information from **Luminate Online** into **The Raiser's Edge**, new or updated constituents now appear on the Constituent Information page in a more organized, tabbed format. The bulk processing action has also been improved to increase the number of constituents that are able to be processed at a time.

Download Constituent Updates from Luminate Online into The Raiser's Edge

New or updated constituents from **Luminate Online** now appear on the Constituent Information screen in a tabbed format, which makes it easier and more efficient to process.

- The **All** tab contains every new or updated constituent from **Luminate Online**.
- The **Linked** tab displays only the constituents from **Luminate Online** that are already linked to a constituent in **The Raiser's Edge**.
- The **Matched** tab displays constituents from **Luminate Online** that have a potential match to a constituent that already exists in **The Raiser's Edge**.
- The **Unmatched** tab displays the constituents from **Luminate Online** that do not match to a constituent in **The Raiser's Edge**.

Constituent Bulk Processing Performance Improvements

With bulk processing, you can now process up to 10,000 constituents at a time from **Luminate Online** into **The Raiser's Edge**.

March 2014 Release

The Raiser's Edge and Luminate Online Integration now includes bulk processing for constituent updates, receipt details, as well as performance enhancements to make communication between **Luminate Online** and

The Raiser's Edge more efficient.

Download Updates from Luminate Online into The Raiser's Edge

To help transfer constituent updates from *Luminate Online* to *The Raiser's Edge*, you can now use the **Bulk Processing** option to process multiple constituents at once.

Fixes and Enhancements

Along with the new features in *Luminate Online* and *The Raiser's Edge* integration, a number of fixes and enhancements have been made.

Gifts paid with check show as "Check" payment type

Donations that were made in *Luminate Online*, with a payment type of check, now appear as such on the Gifts and Registrations page in *The Raiser's Edge*.

Accept ACH payments

You can now successfully process ACH transactions from *Luminate Online* into *The Raiser's Edge*. When you process ACH transactions, the bank routing number is transferred to *The Raiser's Edge*, and is used to create a Bank/Financial Institution relationship for the constituent. You can create a new bank when processing the transaction if necessary. All ACH payments appear on the gift record in *The Raiser's Edge* with a pay method of Direct Debit, and are marked as EFT (Electronic Funds Transfer).

Constituent bulk processing performance improvements

With constituent bulk processing, you can now process up to 10,000 constituents at a time from *Luminate Online* into *The Raiser's Edge*.

Batch processing for incoming messages

To better handle large volumes of data, performance enhancements were made to improve the efficiency in communication between *Luminate Online* and *The Raiser's Edge*.

Primary Addressee field in The Raiser's Edge is not populating Salutation (formal) field in Luminate Online

When you create or edit a constituent in *The Raiser's Edge*, and enter information in the **Primary addressee** field of the constituent record, that information now successfully populates the **Salutation (Formal)** field on the corresponding record in *Luminate Online*.

User interface text updates in Constituent Matching options

To make the options you select in the **Constituent Matching** section of the Luminate Online Options page in *The Raiser's Edge*, the text has been updated.

Solicitors not recorded for Team Raiser participant gift

Previously, when Team Raiser participant gifts were made, and the transaction was processed into *The Raiser's Edge* via bulk processing, the solicitor was not recorded to the record in *The Raiser's Edge*. This issue has now been fixed.

New constituents in Luminate Online are downloaded to The Raiser's Edge with 01/01/2001 birth date

When new constituents were added in *Luminate Online* with no birth date information, the record would transfer to *The Raiser's Edge* with a birth date of 01/01/2001. This issue has now been fixed.

Tributes appear blank on the Donations and Gifts page in the Luminate Online section of The Raiser's Edge

If a donation is made in *Luminate Online*, and is marked as an honor or memorial gift but the **Honoree Name** field is left blank, the gift comes into *The Raiser's Edge* with insufficient information to link the it to a tribute.

Now, when the **Honoree Name** field is left blank in *Luminate Online*, the gift will appear in *The Raiser's Edge* as a normal gift, and not a tribute.

Email status does not transfer when you link a new record to an existing record in The Raiser's Edge

Previously, when you linked a new record from *Luminate Online* with an existing record in *The Raiser's Edge*, and selected to transfer the email status of the new record to the existing record, the email status would not transfer. This issue is now fixed.

Blackbaud Web Services server using non-standard US date format

If the machine on which *Blackbaud Web Services* are installed uses a non-standard United States date format, gifts from *Luminate Online* will not transfer into *The Raiser's Edge*. This issue has now been fixed, and non-standard United States date formats are supported.

When using a regional date format that begins with the Day, recurring gift dates are incorrect

If the machine on which *Blackbaud Web Services* are installed uses a regional date format in which the Day appears first, such as **dd-MM-yy**, recurring gifts that come from *Luminate Online* into *The Raiser's Edge* will have incorrect payment dates. This issue has been fixed to support date formats that begin with the Day.