New Features Guide

09/23/2014 Blackbaud CRM 3.0 New Features US

NewFeatures-2014

New Features for Blackbaud CRM 3.0

Before you upgrade and begin to use ***Blackbaud CRM 3.0***, take a moment to review the following information that highlights new features and changes to existing features. It is important to share this information with ***CRM*** users in your organization.

Database Diagrams and Changes

With each release, we capture information about database changes since the previous version of the program. With the Blackbaud Infinity SDK, you can access this data about any new, modified, and removed tables, views, procedures, functions, fields, indexes, triggers, and parameters.

Note: To install the Blackbaud Infinity SDK, go to the Downloads page on the Blackbaud website at www.blackbaud.com. For more information, see the *Blackbaud Infinity SDK Installation Guide*.

In the folder where you install the SDK, the \SDK\Documentation folder includes .chm files that describe the database schema. Open the BlackbaudEnterpriseCRM.chm file and click **View the list of changes** at the bottom of the main Database Reference page.

We also generate entity relationship diagrams (ERDs) for the database as PDF files. To access these diagrams, open the BlackbaudEnterpriseCRM.chm file, select a table, and click **Entity-Relationship diagram** at the bottom of the page.

The Documentation folder also includes previous versions of the BlackbaudEnterpriseCRM.chm file. You can view previous *.chm files for version-to-version changes.

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.

- Social Media Services on page 9

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.

- Social Media Services on page 9
- Edit Matching Gift Payments on page 42
- Banking Systems and Treasury on page 45
- Start and Stop Automatic Downloads on page 48

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.

- Banking Systems and Constituents on page 10
- Constituent Data Hygiene Processes on page 11
- Blackbaud Internet Solutions Batches on page 47

Security

Existing application users and system roles upgrade unchanged to version 3.0; however, with each version, you should review the new features and any security-related information to determine if you need to make changes or additions to your existing security setup.

Site Security and Constituent Batches

We've updated how site security is applied to new constituents created through Constituent Batch and Constituent Update Batch. If the **Site** field is not included in a batch or the **Site** field is included but is left blank, any site security the batch owner has at the time the batch is committed will be applied to those new constituents. If the batch owner has access to Site A and Site B, when the batch is committed, the new constituent records will be associated with Site A and Site B. Previously, the constituent was associated with no sites which limited access to only users who could access records with no site.

If you are upgrading from a previous version, any existing constituent or constituent update batches will follow the new rule when committed.

Business Process Ownership Tab

To more effectively track and assign business process ownership, on the application user record, we added a new Business Process Ownership tab. This allows all business processes that the application user owns to display in one location. Note that an application user becomes a business process owner in one of two ways: an application user creates a business process or an administrator assigns business process ownership to an application user. This tab displays business processes and their owners, and lists details such as process name and type, security folder, and creation date. You can also filter by process type.

> ***Note:*** To access an application user record, from *Administration*, click **Security**. From the Security page, click **Application users**.

On the Business Process Ownership tab, you can change the owner of a business process. You may find it necessary to edit a process owner, for example, when a change in staff occurs at your organization. You can edit business process ownership for a single process or multiple processes at once. Select a business process and click **Edit owner** to access the Edit business process owner screen where you can use the Application User Search screen to locate a different user. A business process may have only one owner at a time.

> ***Note:*** Security permissions for the business process owner may determine which records are processed when a business process runs.

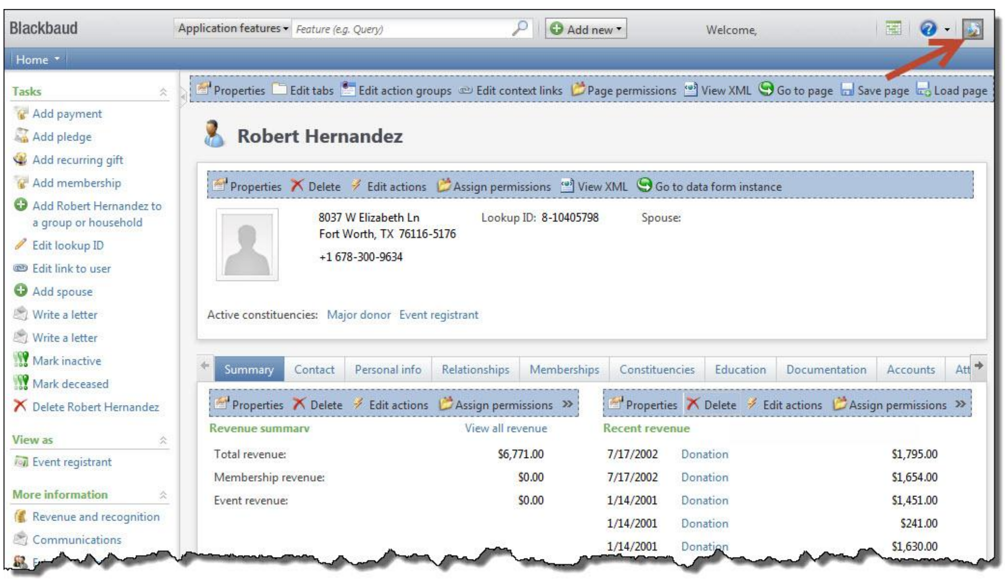
Administration

The following *Administration* enhancements are available in ***CRM 3.0***. For more information about these features, see the *Administration Guide*.

Page Designer in Web Shell

You can now use the design mode in web shell. The design mode allows system administrators to change the design of pages in the application and manage permissions directly from each page. Previously, system administrators could access design mode only from the click once version of the application.

To use page designer, you must select the design mode. To toggle design mode on and off, click the design mode button at the top right corner of the application.



Business Processes Tab

To more effectively track and assign business process ownership, on the Business Processes page, we added a new Business Processes tab. This tab displays business processes and their owners, and lists details such as process name and type, security folder, and creation date. You can also filter processes by type or owner.

From the new Business Processes tab, you can also change the owner of a business process. You may find it necessary to edit a process owner, for example, when a change in staff occurs at your organization. You can edit business process ownership for a single process or multiple processes at once. Select a business process and click **Edit owner** to access the Edit business process owner screen where you can use the Application User Search screen to locate a different user. A business process may have only one owner at a time.

Note: Security permissions for the business process owner may determine which records are processed when a business process runs.

On the Business Processes page, we renamed the Business process statuses tab to “History.” Continue to use this tab to view all business process activity executed in the program.

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Note: To access an application user record, from *Administration*, click **Security**. From the Security page, click **Application users**.

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Note: Security permissions for the business process owner may determine which records are processed when a business process runs.

Batch

The following *Batch* enhancements are available in ***CRM 3.0***. For more information about these features, see the *Batch and Import Guide*.

Constituent Batch and Update Batch

In Constituent Update Batch, you can also include the new **Submitted lookup ID**, **Submitted class year**, and **Submitted educational institution** fields. These are available under **Web user registration** for batch entry templates. The fields allow you to compare information submitted by website users with existing records to determine whether the registrations are duplicates. The fields do not commit to constituent records.

Previously in Constituent Update Batch, if you wanted to create a spouse relationship between two existing constituents, you could only search for a constituent by name. Now, you can also search for a constituent by Lookup ID for spouse and other relationship types.

When you import with Constituent Update Batch, you can now also create relationships between existing individual constituents, such as between parent and child or between siblings.

Additionally, when you import a constituency, a new constituency is added to the constituent record. Previously, you could edit or remove constituencies with an import batch. Now, current constituencies are not affected by the import.

Enhanced Revenue Batch

In previous versions, when you edited a constituent in an enhanced revenue batch, changes were saved to the constituent record immediately. Now, constituent edits are saved to the batch row until you commit the batch.

In addition, several enhancements to the Enhanced Revenue Batch batch type are designed to make it compatible with donation transactions that you download from your ***Blackbaud Internet Solutions*** website.

First, new fields and a new tab now appear on the Edit individual and Edit organization screens that you can access from the batch data entry screen by clicking **Edit** under **Constituent** on the Main tab. These new fields and the tab only appear on batches for web transactions.

- On the Individual tab of the Edit individual screen and the Organization tab of the Edit organization screen, a **New constituency** field now appears under **Other** for web transactions. This field displays the constituency that a donation form assigns to donors. You select this constituency when you create the Donation Form part in ***Blackbaud Internet Solutions***, and the field is not editable in the batch.
- A new Security tab also appears on the Edit individual and Edit organization screens for web transactions.

  The **New site** field allows you to associate the constituents with a particular site at your organization, and the field is blank if site data is not downloaded from ***Blackbaud Internet Solutions***. Selections in this field apply to primary records for batch rows as well as to any associated spouse or business records.

  The **New security group** field allows you to select security groups for constituents. Selections in this field apply to primary records for batch rows as well as to any associated spouse or business records.

Next, Enhanced Revenue Batch now uses notes to attach some data from web transactions to batch entries. This data includes donation notes from website users, corporate gift information, matching gift information, tribute acknowledgee information, and updates to spouse information. When an online donation includes any of this information, a message appears with the batch row. After you commit the batch, the note is saved with that revenue record.

To view a note, select the batch row and click **Edit note** under **Note** on the Revenue tab. Then based on the data in the note, you can decide whether to perform any additional actions.

- For donation messages from website users, no action is necessary. Unless you delete the message, it is saved in the note and attached to the revenue record.
- For corporate gifts, after you commit the batch, you may want to check the organization record for a relationship to the individual who submitted the gift. If the individual is in your database but no relationship exists, you may want to add a relationship.
- For matching gifts, you can click **Matching gifts** under **Revenue details** on the Revenue tab of the batch data entry screen to create a matching gift record. If the matching organization is not already in your database and you have MatchFinder, you probably want to add the organization through MatchFinder before you enter gift information on the Add matching gift claims screen.
- For acknowledgee information, you can go to tribute record after you commit the batch and manually add this information to the record.
- For updates to spouse information, you can compare the information to the existing spouse information to determine whether to update the existing spouse or create a new spouse record. This avoids incorrectly overwriting existing data or creating duplicate records.

Finally, you can now add payments to recurring gifts in Enhanced Revenue Batches and use the new **First payment processed** field to display whether recurring gifts have their first payments. This new option was designed for web transaction batches, but it is available for all Enhanced Revenue Batches.

When you include the **First payment processed** field on a batch template, a read-only column in the Enhanced Revenue Batch indicates whether the first payment was processed for a recurring gift. To view details for a payment or add a new payment to a recurring gift, click **Payment** under **Pledge & recurring gift** on the Revenue tab of the batch data entry screen. On the Payment for recurring gift screen, you can add or edit payment details as necessary, although you cannot edit the **Payment amount** field for donation transactions your ***Blackbaud Internet Solutions*** website.

When you commit a batch that includes a recurring gift with a first payment, credit card information is saved to both the recurring gift record and the payment record.

Site Security and Constituent Batches

We've updated how site security is applied to new constituents created through Constituent Batch and Constituent Update Batch. If the **Site** field is not included in a batch or the **Site** field is included but is left blank, any site security the batch owner has at the time the batch is committed will be applied to those new constituents. If the batch owner has access to Site A and Site B, when the batch is committed, the new constituent records will be associated with Site A and Site B. Previously, the constituent was associated with no sites which limited access to only users who could access records with no site.

If you are upgrading from a previous version, any existing constituent or constituent update batches will follow the new rule when committed.

Banking Systems and Enhanced Revenue Batch

We modified the Add financial account screen accessed through an enhanced revenue batch.

On the Add financial account screen, the **Routing number** or **BIC** for the banking system associated with the financial institution you select now displays.

In addition, the **Account number** field may display differently depending on the financial institution you select. For example, if Europe (SEPA) is associated with the financial institution you select, the **Account number (IBAN)** field appears.

Note: Banking systems are a new feature for this release. For more information about banking systems, see Banking Systems and Treasury on page 45, Banking Systems and Constituents on page 10, and Banking Systems and Constituent Query on page 41.

Communications

The following *Communications* enhancements are available in ***CRM 3.0***. For more information about these features, see the *Communications Guide*.

Constituent Communications

From the Appeals tab, you previously clicked **Edit** and then selected **Constituent appeal** or **Responses**. Now, the dropdown menu is replaced by separate buttons for **Edit constituent appeal** and **Edit response**.

Constituents

The following *Constituents* enhancements are available in ***CRM 3.0***. For more information about these features, see the *Constituents Guide*.

Quick Find

To quickly find a constituent's record, you can now enter a name or constituent lookup ID in the quick find field. Previously, you could only use names in the quick find search field.

Relationships Tab

On a constituent record, the Relationship tab previously contained one button to add a relationship, and you selected whether you wanted to add an individual, organization, or group/household relationship. Now, the Relationship tab contains **Add individual**, **Add organization**, and **Add group/household** buttons you can use to add each type of relationship.

The tab now also shows the constituent's employment history. You can now edit a constituent's employment information from this tab. Previously, employment history was a separate tab.

Personal Tab

On a constituent record, the Personal tab previously did not show the constituent's first, middle and last names. Now, the personal information section shows the constituent's first, middle and last names. To edit the constituent's name, click **Edit**.

Additionally, you can now edit name formats and aliases from the Personal tab. You previously used the Name tab.

Organization Tab

On a constituent record, the Organization tab previously did not show the constituent's name. Now, the organization details section also shows the organization's name. To edit the name, click **Edit**.

Additionally, you can now edit name formats and aliases from the Organization tab. You previously used the Name tab.

Contact Tab

On a constituent record, the Contact tab is now divided into **Addresses**, **Phone numbers**, and **Email addresses**. You can collapse and expand these lists. To learn more about an address, phone number or email address, expand its list. You can also click **Add** for each list to add new contact information.

You can also use the new **Social media accounts** list to manage information about a constituent's social media and networking accounts, such as *Facebook*, *Flickr*, *Google+*, *LinkedIn*, and *Twitter*. To go directly to a constituent's profile page, you can click the account link. You can use information on constituents' profile pages to build relationships with members and volunteers.

Documentation Tab

The default sort order for items listed on the Documentation tab is now by descending date.

Previously, you used the **Notification** menu to add, edit and delete notifications. Now, the dropdown menu is replaced by separate buttons. You can click **Add notification** to create a notification. If notifications already exist, **Edit notification** and **Delete notification** buttons also appear.

More Information: Interactions

The default sort order for items listed on the Interaction tab now is now by descending date. When interactions are sorted by date, they are no longer grouped.

More Information: Communications and Appeals

From the Appeals tab, you previously clicked **Edit** and then selected **Constituent appeal** or **Responses**. Now, the dropdown menu is replaced by separate buttons for **Edit constituent appeal** and **Edit responses**.

Social Media Services

You can now track social media and networking services for constituents. *Blackbaud* configures some social media and networking services by default, including *Facebook*, *Flickr*, *Google+*, *LinkedIn*, *Myspace*, and *Twitter*. You can add and configure additional services to track with the **Social Media Services** configuration task in *Constituents*, which uses the Social Media Account Type code table.

When you add a social media or networking account to a constituent record, the service's icon now appears under the constituent's profile image. You can click the icon to go to the constituent's social media profile page.

Constituent Profile Report

When you view a **Constituent profile** report, **Biographical details** now includes information about the constituent's social media and networking accounts, such as the service name, user ID, account type, information source, and communication preference.

Default Interaction Owners

We have made an enhancement to streamline data entry when you add interactions. If a constituent is linked to a system user and that user adds an interaction to any constituent record, the interaction owner is automatically defaulted to the user adding the interaction. The user can change the interaction owner manually if needed.

Banking Systems and Constituents

With this release, we introduce several enhancements that will eventually support full implementation of the Single Euro Payment Area (SEPA) banking system for direct debit transaction processing in a future release.

SEPA is a payment-integration initiative of the European Union designed to simplify bank transfers. The SEPA banking system option will be available in addition to the Automated Clearing House (ACH) banking system, which is currently supported. The following enhancements are now available to help you plan and prepare for SEPA implementation at a future time.

Note: To enable or disable banking systems, click **Banking systems** on the Treasury page. For more information, see Banking Systems and Treasury on page 45.

We made several enhancements throughout *Constituents* to help you manage all information related to banking systems:

- On the Add and Edit constituent financial institution screens, we added the **Banking system** field. In addition, routing number and BIC fields display differently depending on the banking system you select.

For example, if Europe (SEPA) is an enabled banking system, and you select it in the **Banking system** field on this screen, the **BIC** field appears.

Warning: The **Banking system** field cannot be edited when the constituent financial institution is linked to a constituent account.

- On the Constituent Financial Institution page, we added the **Banking system** column. In addition, fields associated with each enabled banking system display on the page to indicate information specific to each banking system. The **Banking system** column only displays when more than one banking system is enabled.
- On the Financial institution search screen, we added the **Banking system** field. Only financial institutions associated with the banking system you select display in the **Results** grid. The **Routing number** field displays differently depending on the enabled banking systems. For example, if USA (ACH) and Europe (SEPA) are enabled banking systems, the **Routing number** field now displays as **Routing/BIC**. The **Results** grid now displays the **Banking system** column as well as routing number and BIC fields associated with the banking system.
- On the Accounts tab of a constituent record, we added the **Banking system** column. In addition, fields associated with each enabled banking system display on the page to indicate information specific to each banking system. The **Banking system** column only displays when more than one banking system is enabled.
- On the Add and Edit financial account screens, the routing number or BIC for the banking system associated with the financial institution you select displays. In addition, the **Account number** field may display differently depending on the financial institution you select. For example, if Europe (SEPA) is associated with the financial institution you select, the **Account number (IBAN)** field appears.

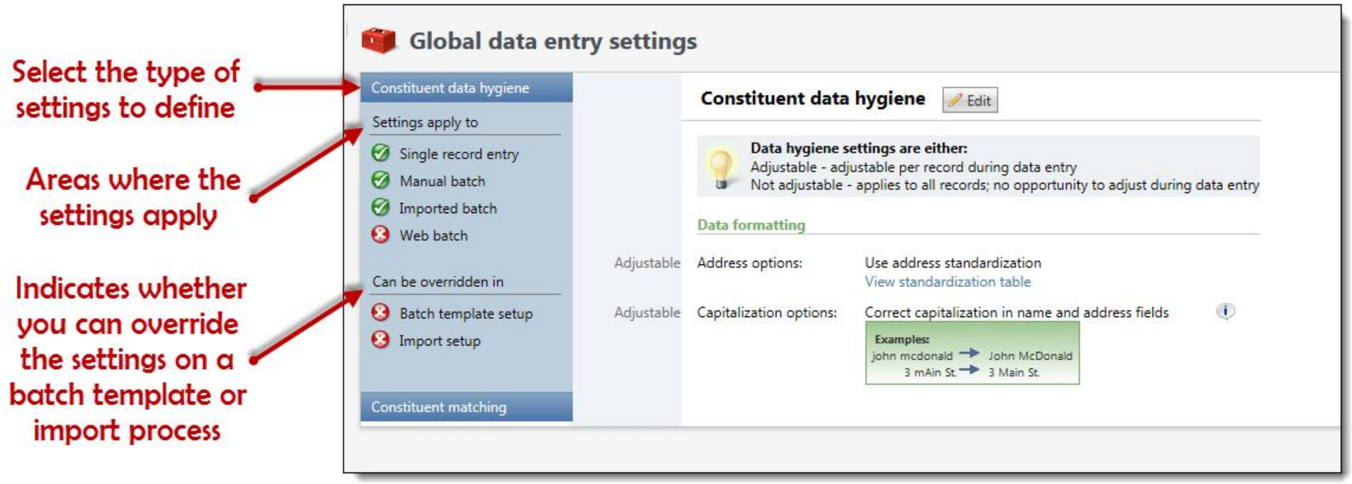
Note: When more than one banking system is enabled, the **Banking system** field as well as fields associated with the enabled banking system, such as **Routing number** and **BIC** fields, display throughout the program. When only one banking system is enabled, these fields do not appear.

Constituent Data Hygiene Processes

We added enhancements and new features that support constituent data hygiene processes.

Global Data Entry Settings

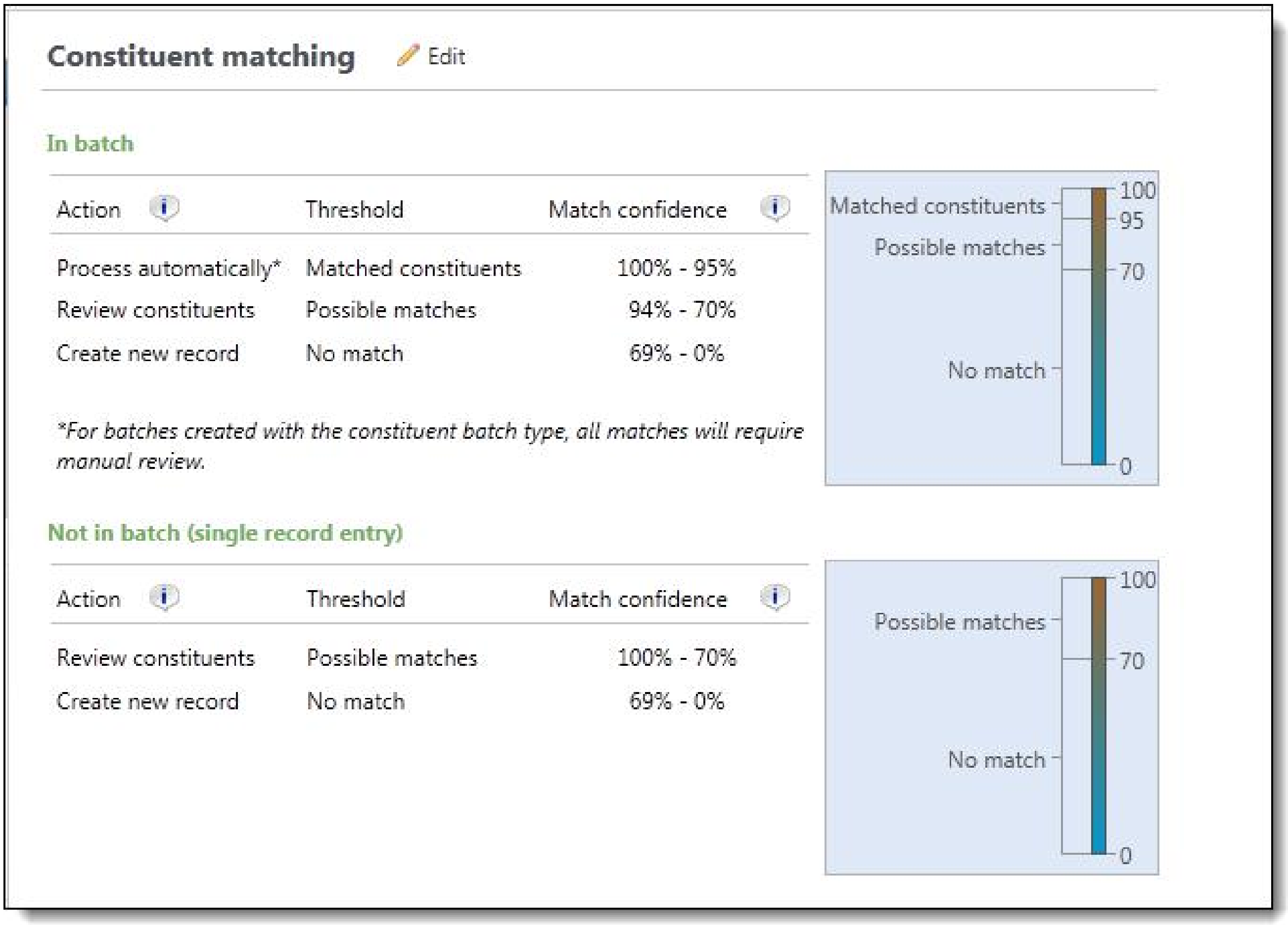
You can define data entry rules to keep your constituent data clean and formatted consistently. To make configuration easier, we grouped these settings in one location. From *Administration*, click **Global data entry settings**.



Constituent Matching Settings

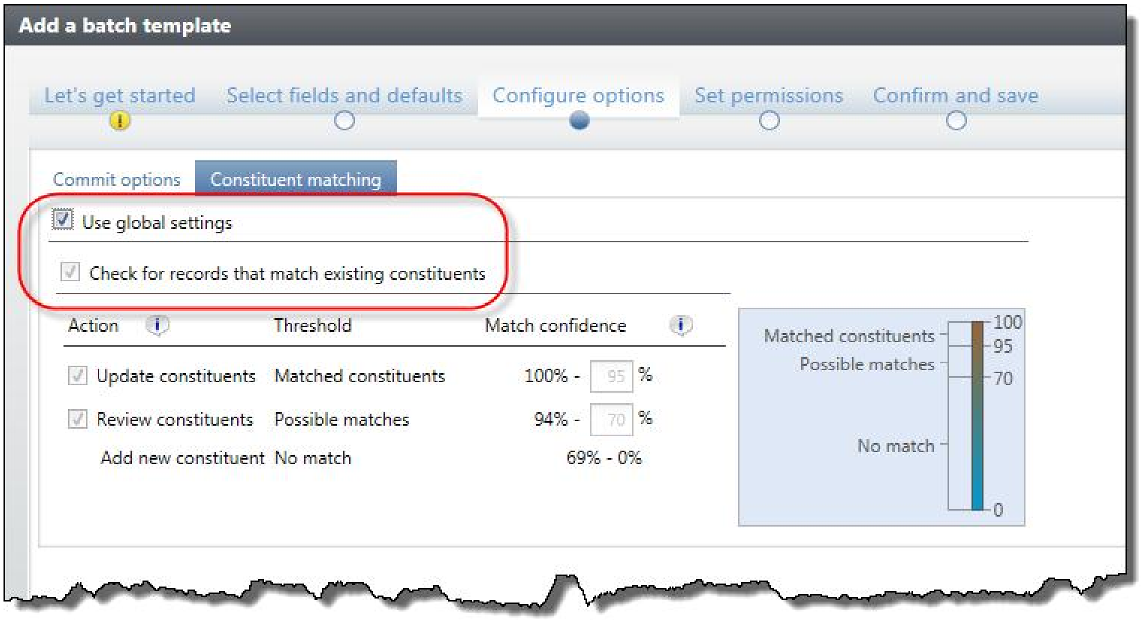
In previous releases, you accessed the Constituent matching settings directly from *Administration*. Now you select **Constituent matching** from the Global data entry settings page.

To make the options on the Constituent matching settings page easier to understand, we changed the order of the columns and renamed the actions in the **Action** column.

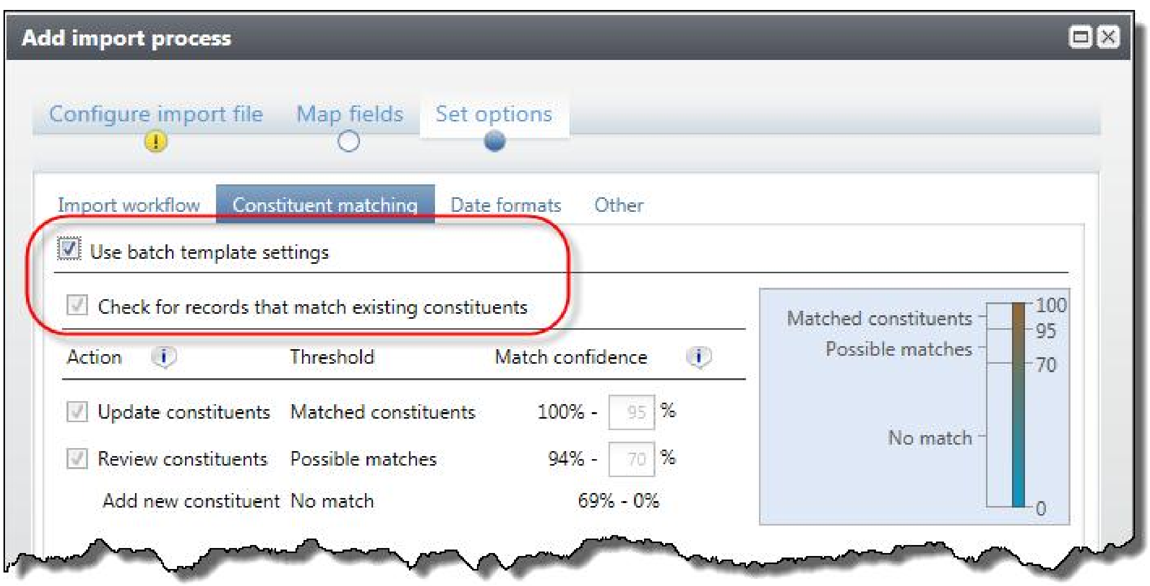


The same label and column updates were made on the Add/edit batch template and the Add/edit import process screens for batches and templates that support constituent matching.

Also, on batch templates, you can now select **Use global settings** to use the settings defined on the Constituent matching settings page in *Administration*. If you select this option, matching settings on the template are updated automatically any time you update matching settings in *Administration*. To change the default settings, clear **Use global settings**, select **Check for records that match existing constituents**, and then adjust the thresholds.



Likewise, on import processes, you can now select **Use batch template settings** to use the percentages defined on the batch template selected for the import. If you select this option, matching settings on the import process are updated automatically any time you update matching settings on the associated batch template. To change the default settings, clear **Use batch template settings**, select **Check for records that match existing constituents**, and then adjust the thresholds.



We also made Improvements to how the program handles updates to data for matched constituents. For more information, see Constituent Update Rules on page 15.

Note: Constituent matching is now available for Membership Dues batches. Matching was previously available for only Constituent Update, Enhanced Revenue, Revenue, Revenue Update, and Sponsor batch types.

Constituent Update Rules

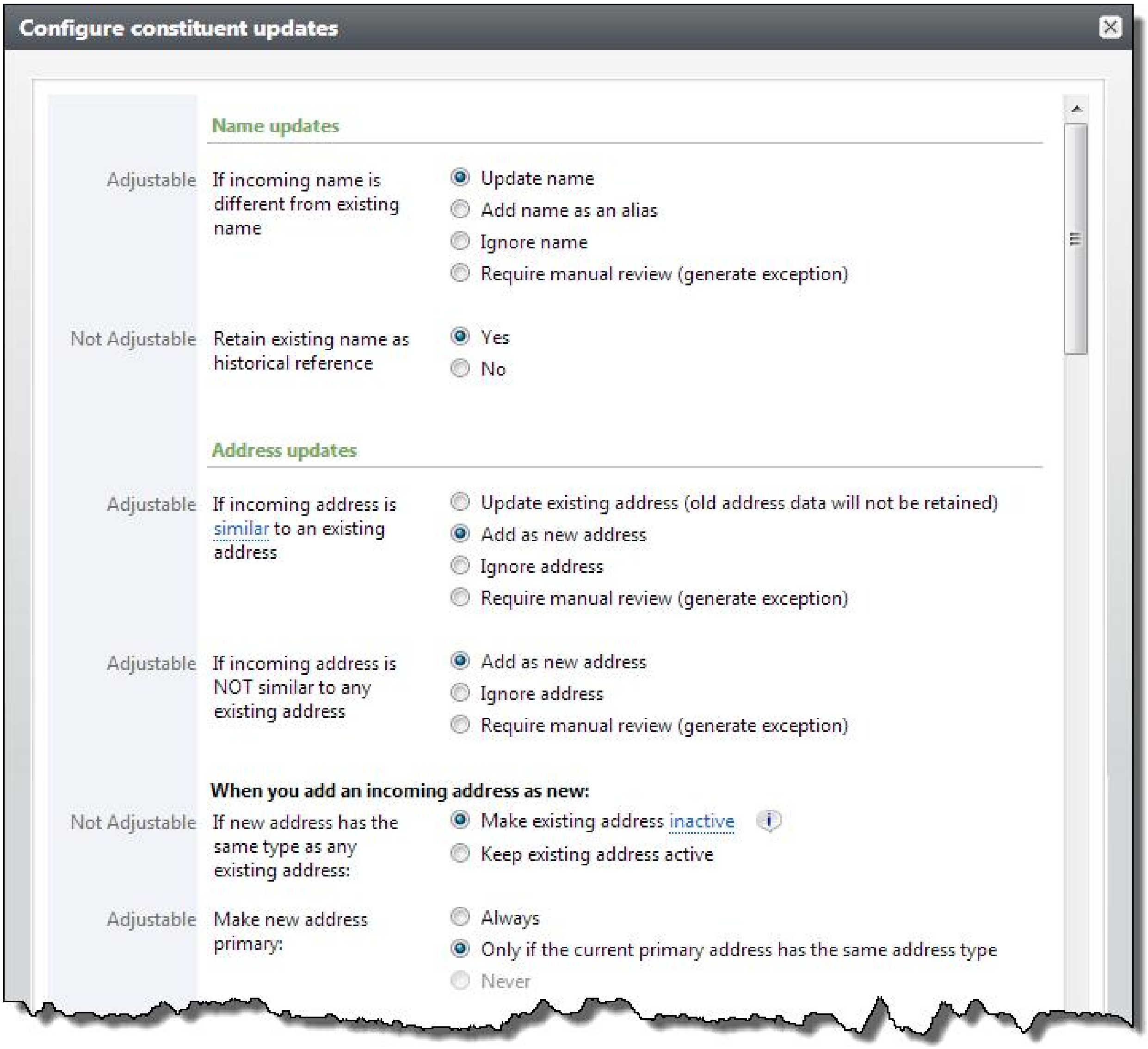
In previous versions, if matching constituents qualified for automatic updates (their matching scores were above the top threshold), you could not specify what to do with conflicting incoming information. For example, if two records were very similar but the first name was "Dave" on the existing constituent and "David" on the incoming constituent, you could not specify what to do with the conflicting names. For Constituent Update batches, the program automatically updated the existing constituent's name and added the address, phone, and email as primary. You had no options for handling this data differently.

You can now define constituent update rules to manage how the program resolves conflicting data on matched constituents. For example, you can set the program to update the existing name, add the incoming name as an alias, ignore the incoming name, or require users to compare the constituents on the duplicates resolution screen to determine which action to take.

To define constituent update rules, go to *Administration* and click **Global data entry settings** under **Data**. On the Global data entry settings page, select the new **Constituent updates** option. The Constituent updates (for matched constituents) page appears. On this page you can view the rules configured for your organization.

Warning: If you use a ClickOnce installation of ***Blackbaud CRM***, **Constituent updates** is disabled on the Global data entry settings page. For ClickOnce installations, the program uses the default constituent update rules; you cannot edit these. Do not attempt to configure the constituent update rules using the web shell link because it will make ClickOnce inaccessible.

To edit the rules, click **Edit**. The Configure constituent updates screen appears.



On this screen, you can specify how to handle data conflicts for names, addresses, email addresses, phone numbers, and birth dates. Constituent update rules are intended to automate the update process so that data is handled for you according to defined rules. However, if you prefer to be more "hands-on" with your data, you can select **Require manual review (generate exception)** to ensure that each matching record is evaluated by a user on the Possible duplicate matches screen before the program makes any updates. If you select this option for any field, the program does not apply updates to other fields on the existing record, regardless of the selected rule, until you complete the Possible duplicate matches screen. For example, if you select **Require manual review** for names but **Update existing address** for addresses, the program does not automatically update the address fields on the existing constituent.

When Do Rules Apply?

Constituent update rules are applied when data conflicts under these circumstances:

- When you add a new constituent using the Add an individual screen or the Add an organization screen and it matches an existing constituent according to your defined constituent matching settings.

- When you add a constituent through manual Constituent Update and Enhanced Revenue batches and it matches an existing constituent according to your defined constituent matching settings.
- When you add a constituent through imported Constituent Update and Enhanced Revenue batches and it matches an existing constituent according to your defined constituent matching settings and you *exclude* the constituent ID.
- When you edit a constituent through imported Constituent Update and Enhanced Revenue batches and you *include* the constituent ID.

Constituent update rules do NOT apply when data conflicts under these circumstances:

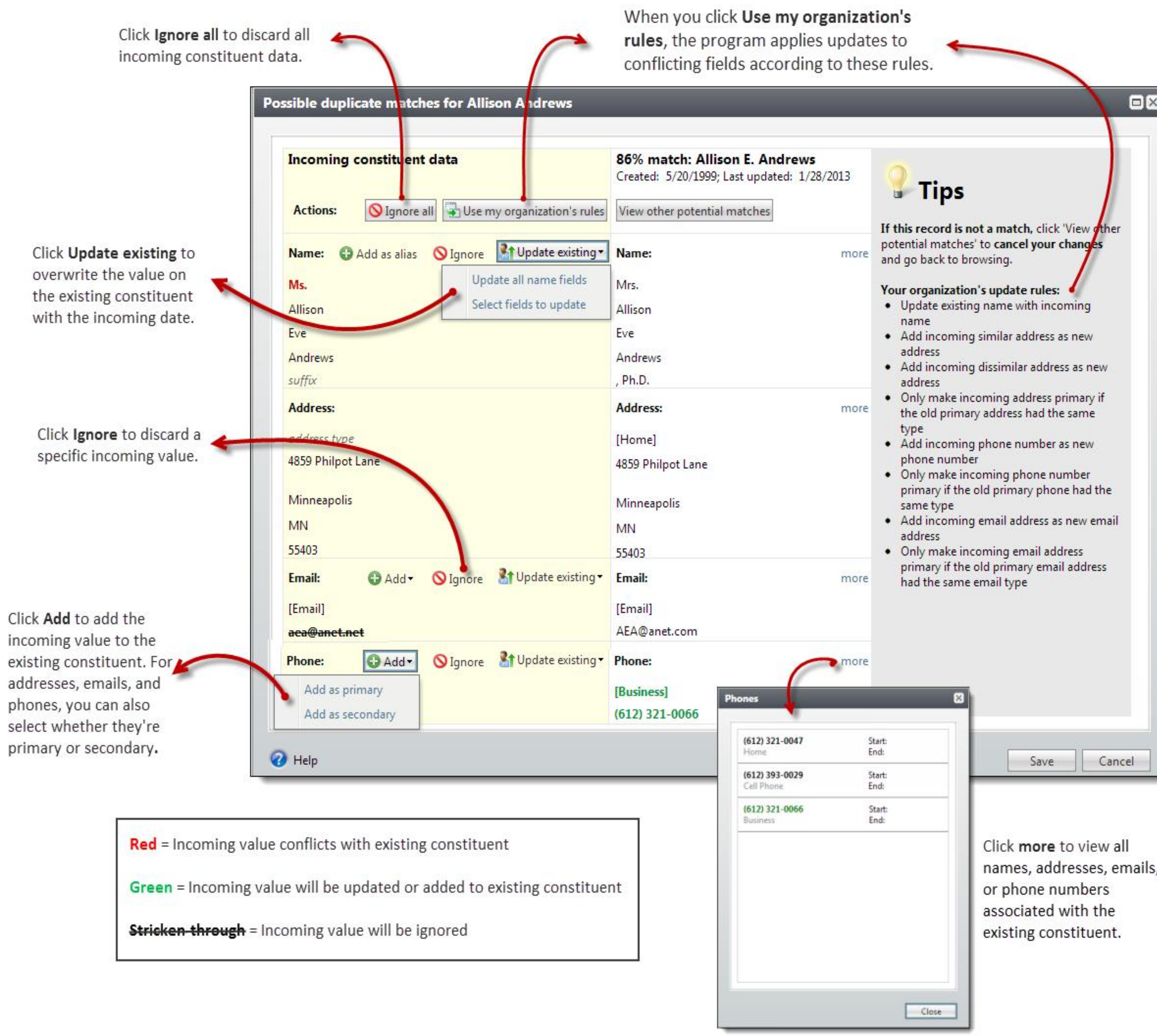
- When you edit a constituent using the Edit an individual screen or the Edit an organization screen.
- When you add a constituent through manual Constituent Update and Enhanced Revenue batches and *include* the constituent ID.

Constituent update rules apply only to Constituent Update and Enhanced Revenue Batch batches, as well as the import processes that use those types of batch templates. For additional flexibility, you can set different constituent update rules for individual batch templates and import processes. From the Add/Edit a batch template screen, select the Constituent updates tab under **Configure options**. From the Add/Edit import process screen, select the Constituent updates tab under **Set options**.

Possible Duplicate Matches Screen

We made enhancements to the Possible duplicate matches screen that appears when you add a potential duplicate constituent through manual or imported Constituent Update and Enhanced Revenue batches, or using the Add an individual or Add an organization screen. We updated the labels and appearance of existing options to make it easier to make decisions about how to handle incoming data. We also made it possible to choose whether incoming addresses, email addresses, and phone numbers are primary or secondary.

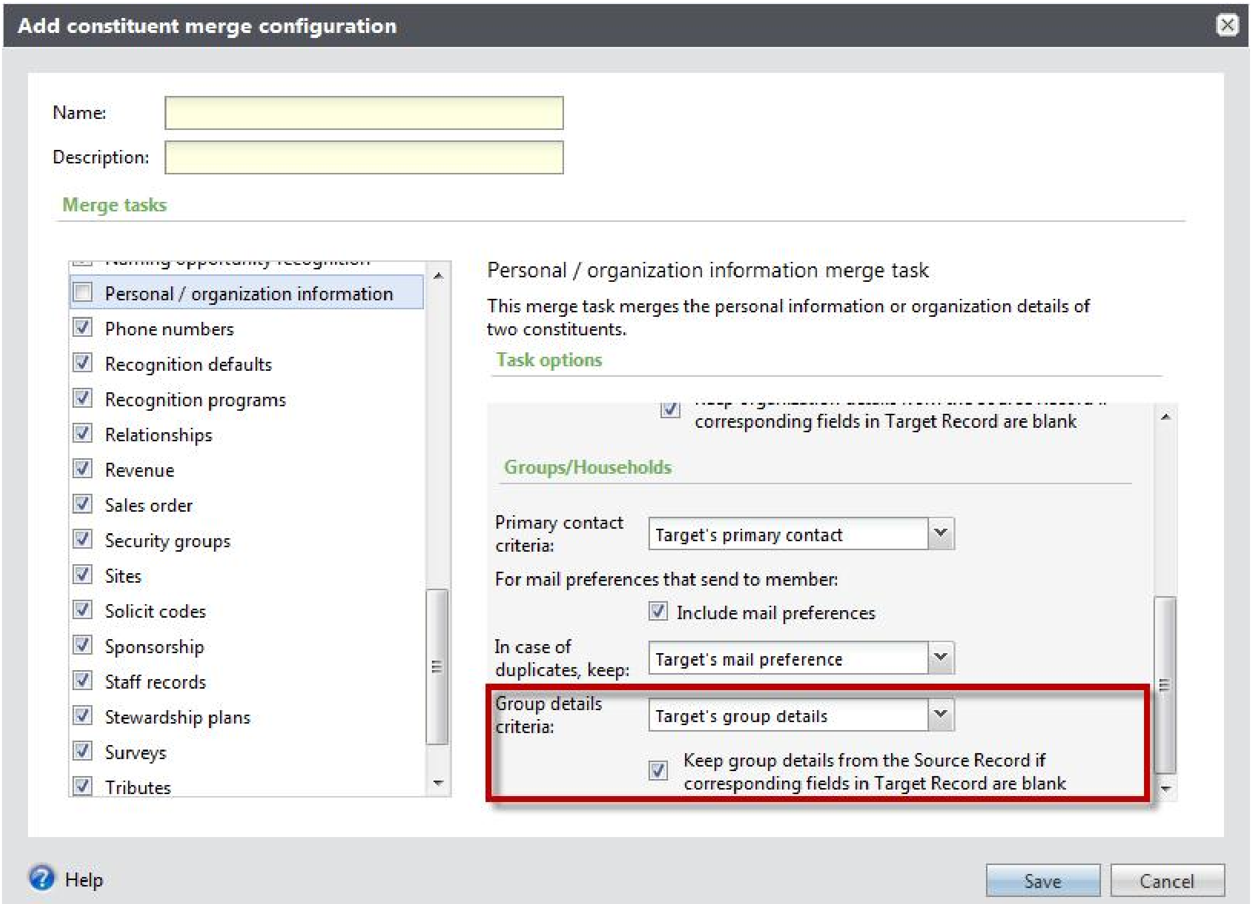
In addition, the Possible duplicate matches screen now supports enhancements associated with the new constituent update rules. If you select **Require manual review (generate exception)** for any constituent update rule, you must manually review matches on the Possible duplicate matches screen even if the matches qualify for automatic updates (their matching score is above the top threshold). Using the new **Use my organization's rules** button on the Possible duplicate matches screen, you can quickly apply your organization's constituent update rules to automate the resolution process. For example, if you have **Add incoming phone number as new phone number** set as a rule, when you click **Use my organization's rules**, the program automatically adds the incoming phone number to the existing record.



Merge Group Data

You can now retain group information when you merge constituent records. This includes inception date, type code, and name format function. To view these group data merge enhancements, select **Personal/organization information** on the Add constituent merge configuration screen.

In the new **Group details criteria** field, select whether to retain group details from the target, the source, or the group with the most recent inception date. You can select the checkbox below the field to prevent the merge process from overwriting group data when fields are blank.



Events

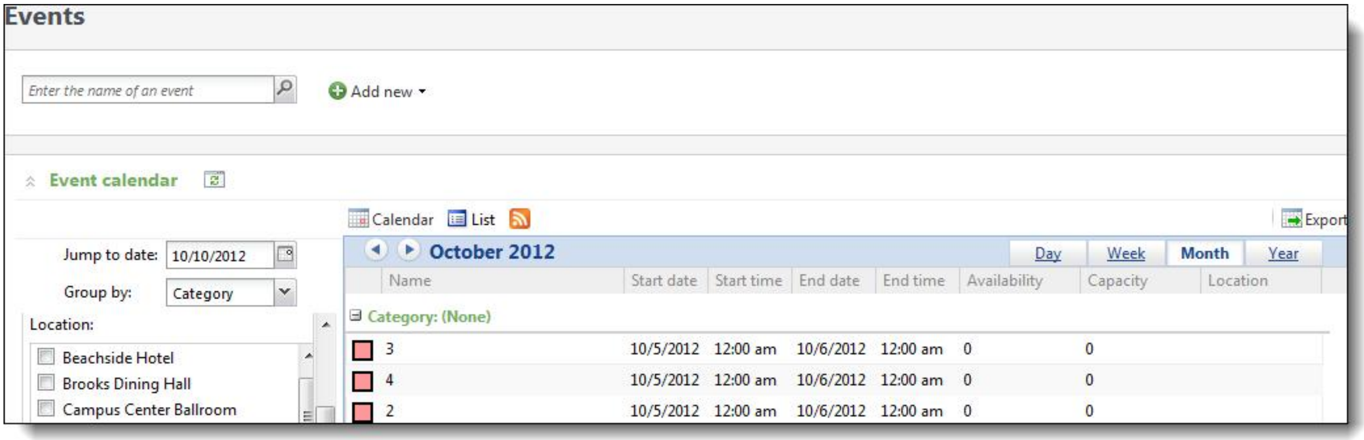
The following *Events* enhancements are available in ***CRM 3.0***. For more information about these features, see the *Events Guide*.

Enhancements to the Events Page

On the Events page, a new **Capacity** column on the List tab displays the total capacity for events. You can click the column header to sort the list by capacity.

In addition, the **Category** and **Location** filters on the Events page now retain your filter selections the next time you log in. This makes it easier to view the event information that is most important to your organization.

Other enhancements have been made to the Events page, such as the ability to collapse and expand the calendar. You can also set up RSS feed alerts for newly added events and changes made to existing events.



Event Reports

The Event Comparison, Event Summary, and Event Revenue reports were updated to display additional event expense information. The Event Comparison report now shows agreed upon, actual and budgeted amounts. The labels and messages on the Event Summary and the Event Revenue reports were updated to clarify the expense terminology.

To access these reports, go to the Events page.

Restrictions for Event Registrants

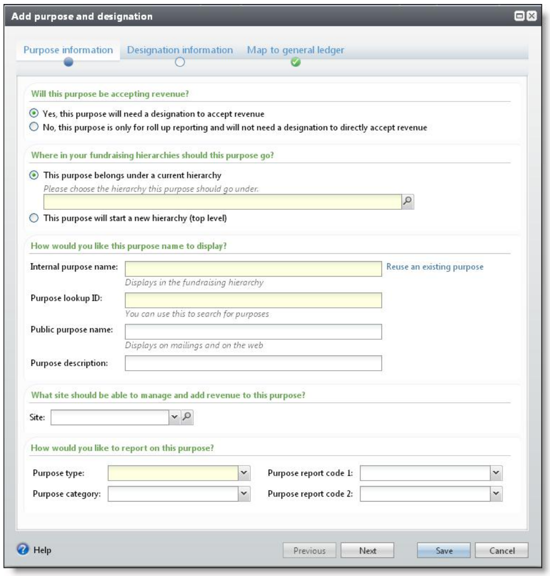
From the Restrictions tab, to edit a constituent's event restrictions, including setting defaults such as Kosher or Vegetarian meals, you previously clicked **Edit** and then selected **Registration restrictions** or **Constituent default restrictions**. Now, the dropdown menu is replaced by separate buttons for **Edit registration restrictions** and **Edit constituent default restrictions**.

Fundraising

The following *Fundraising* enhancements are available in ***CRM 3.0***. For more information about these features, see the *Fundraising Guide*.

Add Purpose and Designation

You can create purposes and designations from multiple locations in the system. With this release, we added the Add purpose and designation wizard to help streamline this multi-step process. By following the steps in the wizard, you can create a purpose, designation, and map the purpose or designation to a general ledger account.



In the wizard you will specify if the purpose is only for reporting, or if you need a purpose and a designation to accept revenue. You can also choose where to put the designation or purpose in the hierarchy.

When you create purposes and designations using the Add purpose and designation wizard, the system assumes you want to create a designation to accept revenue that will go under a current fundraising hierarchy. The wizard defaults to “Yes, this purpose will need a designation to accept revenue” and “This purpose belongs under a current hierarchy.” You can change these options if that is not what you want to do.

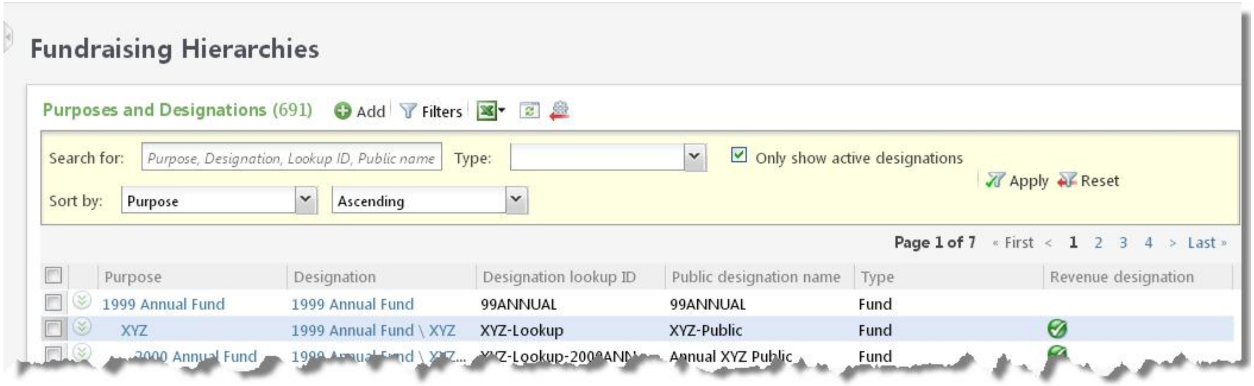
To access the Add purpose and designation wizard, select **Add purpose and designation** under **Fundraising**, on the Fundraising page.

Fundraising Hierarchies

With this release, we made it easier to locate and mange your designations. The Fundraising Hierarchies grid now displays all the designations in the grid in an alpha-numeric order. You can search for a designation numerically and then alphabetically, while maintaining the hierarchy structure.

We also enhanced the designation filters and search functionality within the grid. Now you can you can enter any portion of a purpose, lookup ID, designation, or public name in the **Search for** field to return valid results. For example, if you enter "2012," any lookup ID, purpose, designation, or public name in your database containing the number "2012" appears in the search results. You can also sort the grid by purpose, designation, lookup ID, public designation name, and type.

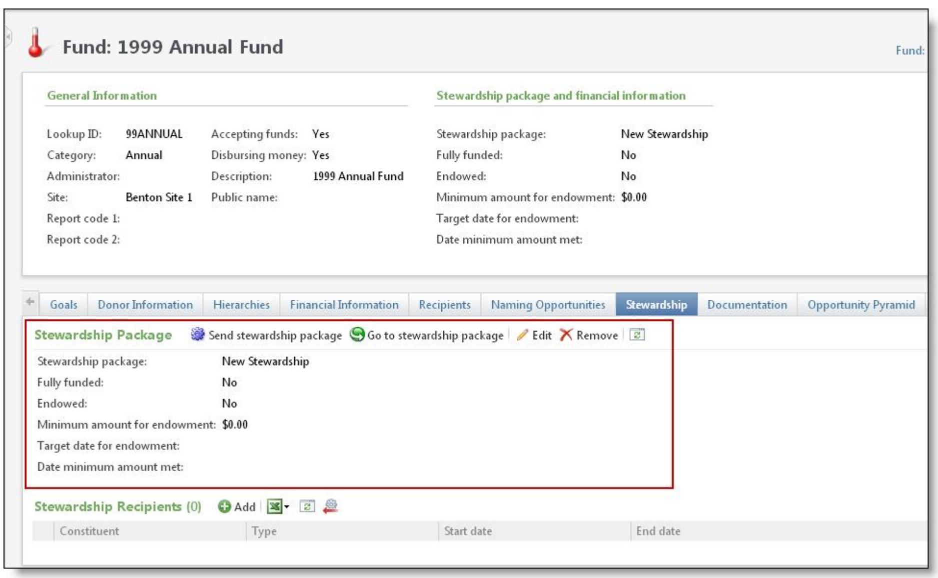
On the Fundraising page, the **Fundraising hierarchies** link is now located under **Fundraising**.



Stewardship Package

Previously when you linked a stewardship package to a purpose, you did so from the Add a purpose screen. To better streamline this process, we moved the ability to add and edit stewardship packages to the Stewardship tab of the Purpose record. A new section called **Stewardship Package** now appears on the tab.

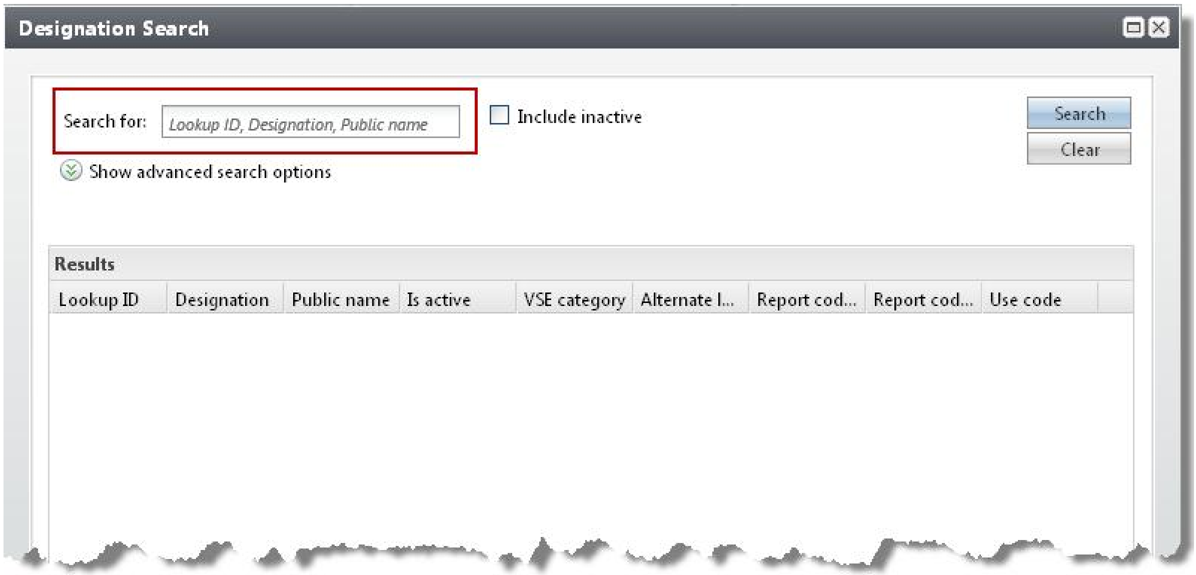
Once you link a stewardship package to the purpose, the information displays in the summary section as well as on the Stewardship tab. You can also now send and access stewardship packages from this tab.



Designation Search

With this release, we made it easier to search for designations by adding a link to the Designation Search form on the Fundraising page for quick access.

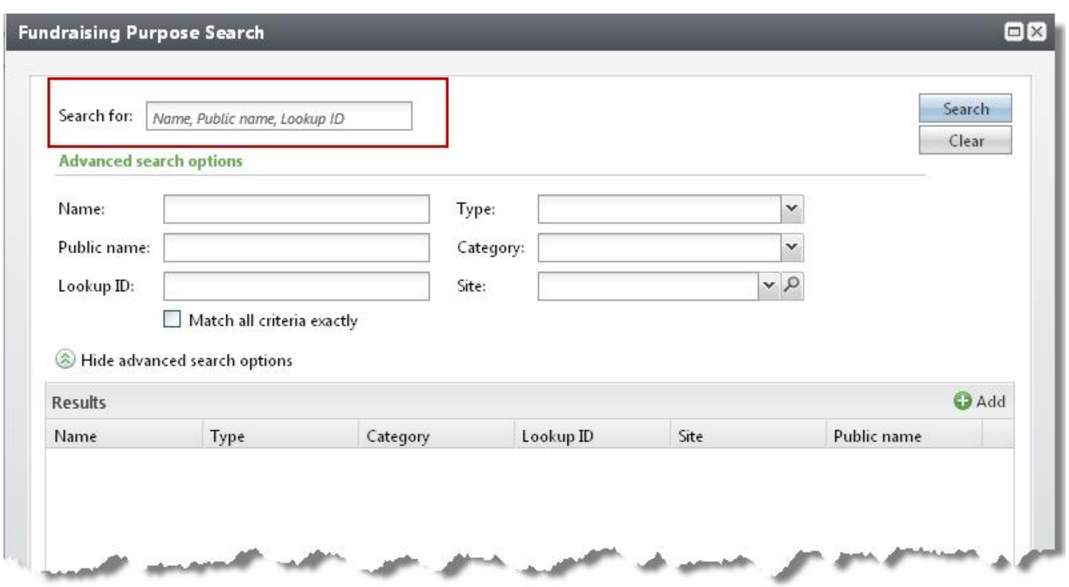
We also enhanced the designation search functionality. Now you can you can enter any portion of a lookup ID, designation, or public name to return valid results. For example, if you enter "Appeal," any lookup ID, designation, or public name in your database containing the word "Appeal" appears in the search results.



Note: You can still access the advanced search options by selecting **Show advanced search options**. When you expand those fields, you can use VSE category, Use code, Purpose type, Purpose category, Purpose site, and Report code 1 and Report Code 2 fields to narrow your search.

Fundraising Purpose Search

With this release, we enhanced the fundraising purpose search functionality. Now you can you can enter any portion of a lookup ID, name, or public name to return valid results. For example, if you enter "2012," any lookup ID, name, or public name in your database containing the number "2012" appears in the search results.



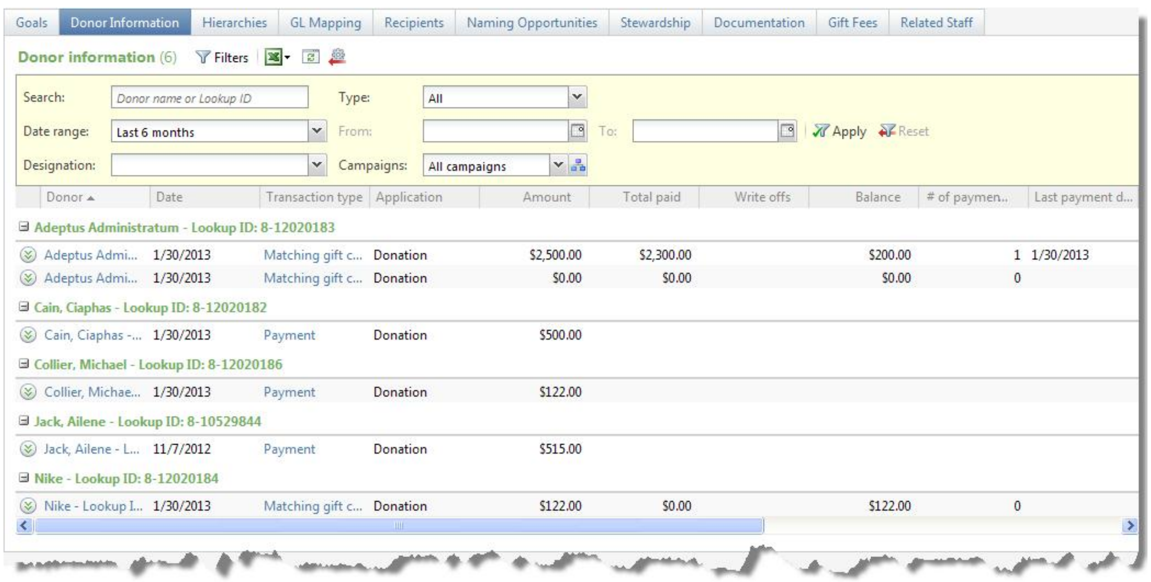
Note: To access the advanced search options, select **Show advanced search options**. When you expand those fields, you can select additional filters to narrow your search.

All purposes that satisfy your criteria appear in the search grid. Choose a purpose and click **Select** to open it. If necessary, you can add a new fundraising record from this screen. When you select **Add** from this screen, you are taken to the new Add purpose and designation wizard.

To access the Fundraising Purpose Search screen, select **Purpose search** under **Fundraising** on the Fundraising page.

Donor Information Tab

When you select the **Has donor information** checkbox on the Add fundraising purpose type screen, the Donor Information tab appears on fundraising purposes based on the type. From this tab, you can review information about the revenue a purpose has received from donors. For example, you can see the highest gift given to the purpose, what type of gift was it, if there were any write-offs, when the last payment was made, and when the most recent gift was made.



With this release, we've added more revenue information to the details section of the tab and provided filters to make reviewing information easier. The filters are located just above the **Donor information** grid. In addition to the **Search** field, you can filter the results by designation, campaigns, transaction types, or date ranges. Using the filters, you can quickly access information about the transactions, such as the largest transaction or most recent transaction for this purpose. Keep in mind, when you use the filters, column values can change based on the filters you apply.

The **Donor information** grid includes columns for Donor, Date, Transaction type, Application, Amount, Total paid, Write offs, Balance, # of payments made, Last payment date, Original transaction amount, Designations, Campaigns, Corpus, and Benefactor. In the grid use the arrows next to each donor to expand and collapse the information as needed. If any of the transactions from the constituent were made anonymously, the anonymous icon appears by the constituent name. If any of the payments had splits, the revenue splits icon appears by the constituent's name.

For more information about the Donor information tab, including how each column in the grid is calculated, see the *Fundraising Guide*.

General Features

The following general features enhancements are available in ***CRM 3.0***. For more information about these features, see the *General Features Guide*.

Shortcuts Added

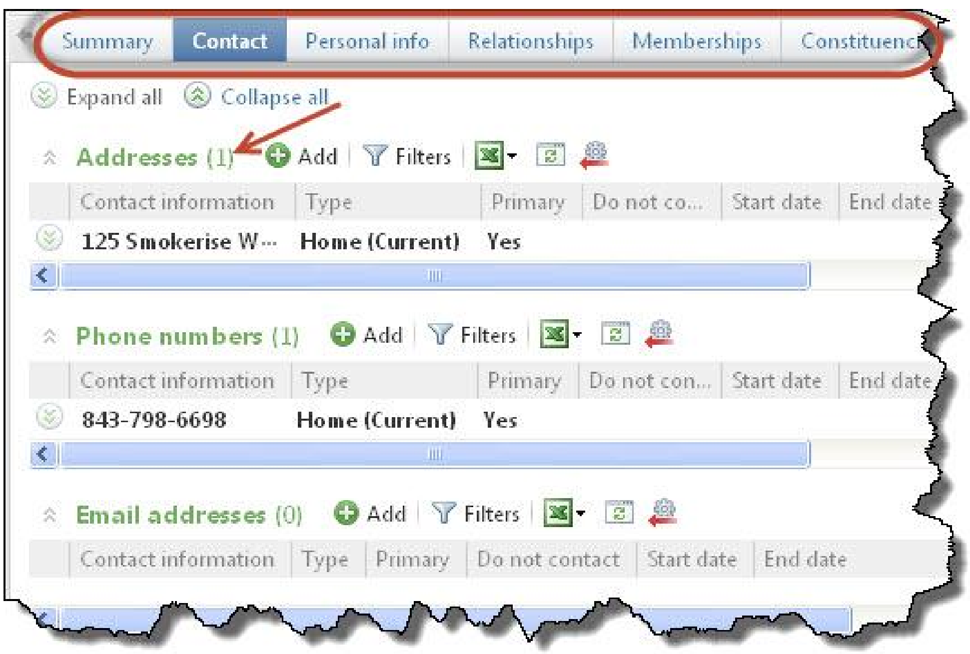
To replace the **Favorites** functionality, we added the **Shortcuts** feature. This new feature creates shortcuts to pages and records that you access frequently. When you specify pages as shortcuts, you can quickly access them from the **Shortcuts** menu on the explorer bar.

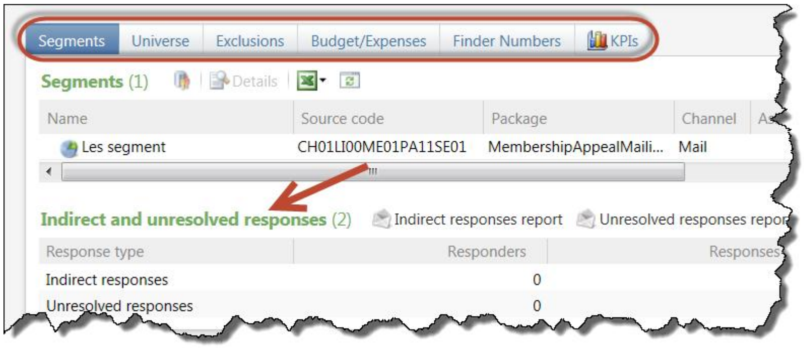
In addition, you can organize, rename, delete, and email shortcuts.

Tabs and Headings

We changed the way tabs and headings appear on records and pages. Tabs are now visually delineated. Section headings on tabs are larger and green for increased visibility, and include an item count for each section.

We also added options to **Expand all** and **Collapse all** for tabs with more than one section heading. You can still use the arrows next to each section to expand or collapse just that section.





Column Width in Search Screens

When you adjust a column width on a search screen, the program now remembers your preferred column width. The next time you use that screen, your previously-selected column width is displayed.

Also on search screens, the background color of the **Results** grid is now white to ensure that the **Add** button is not overlooked. And to make it more clear when no search results are found, a new message appears in the grid when this happens.

Organizational Calendar RSS Feeds

From the Organization calendar, you can now receive notifications as a Really Simple Syndication (RSS) feed through your browser or reader such as Microsoft Outlook. To receive RSS feed notifications, click **View RSS feed** on the Organization Calendar page. You can select to receive notifications when new events and calendar items are added.

General Ledger Setup

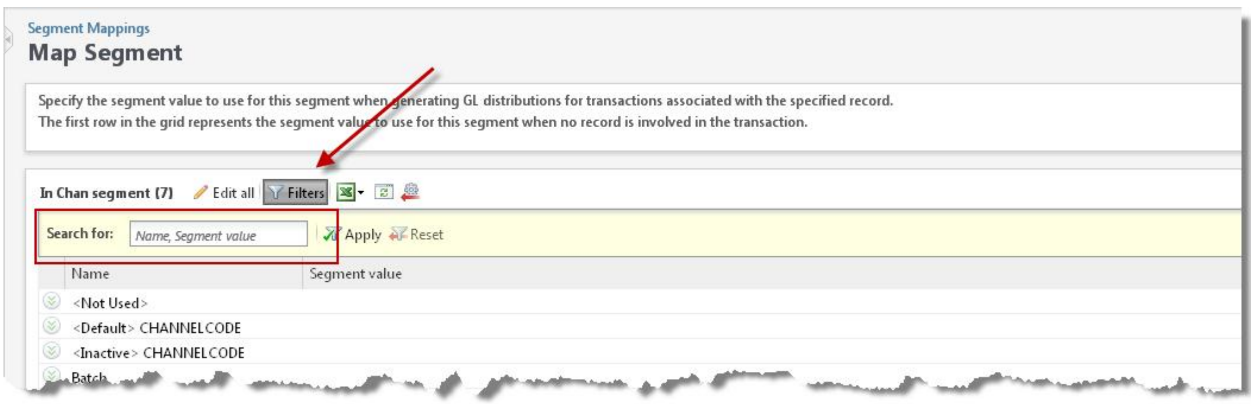
The following General Ledger mapping enhancements are available in ***CRM 3.0***. For more information about these features, see the *Administration Guide*.

Segment Value Search

With this release we improved the segment mapping search functionality. When you map a segment or composite segment from the Define Segment Mappings page, a new search form lets you quickly browse for segment values. For example, when you map an individual segment, you can select the magnifying glass icon in the **Segment value** field to access the Segment Mapping Value Search appears.

To use this form, enter the **Segment value** field and select **Search**. You can then select the segment value from the results grid.

We also added a **Search for** field to the Map Segment and Map Composite Segment Values grids.



You can use this search to save time locating segments and composite segments you want to map. To access the **Search for** field, select **Filters** on the toolbar above the grid.

Memberships

The following *Memberships* enhancements are available in ***CRM 3.0***. For more information about these features, see the *Memberships Guide*.

Constituent Membership Page Enhancements

We made several enhancements to the constituent membership page to bring additional information to your fingertips.

On a constituent membership page, you can now view add-ons associated with the membership. Add-ons now appear in their own section. By default, only current, active add-ons are displayed, but you can select to include expired add-ons.

On a constituent membership page, member constituencies now appear in the **Additional details** section. Previously, these were located in the **Primary member** section.

On a constituent membership page, membership cards now appear in their own section instead of in the **Benefits and sent items** section.

On a constituent membership page, you can now view a summary panel of the comments or notes associated with the membership revenue transaction, as well as comments associated with the membership details. From this panel, you can also edit the comments. Previously the membership revenue comments were accessed from the revenue transaction and the membership comments were accessed from the Edit membership details screen.

Membership Widgets

In addition to basic information about the program, you can view two widgets on the General tab: Membership Activity and Membership Revenue. Membership Activity compares joins and renewals over two time periods, such as this month compared to this month last year. Membership Revenue compares the revenue of membership levels over two time periods. A maximum of five levels are displayed. If there are more than five levels, the five levels with the most revenue are displayed. Add-on revenue is included. These widgets are based on data from the data warehouse. Information about when the data was last updated is displayed below the widgets.

Mid-term Membership Upgrade

You can sell an upgrade to a membership during the membership, but prior to the renewal window. In order to be eligible for an upgrade, the membership must be changing from one level to a higher level, such as from Individual to Family, or from a shorter term to a longer term. You cannot upgrade a membership from one membership program to another.

If a membership is eligible to be upgraded, an **Upgrade now** button appears for the membership on the constituent's Memberships tab and on the constituent membership page. The only level and term options available are ones that change the membership to a higher level with same or longer term or to a longer term at the same level.

Membership Programs with Payments in Another System

Some membership programs in your organization may be managed and have revenue tracked in other systems, but you may still be interested in information about members for the other program. For example, a university's alumni association may be interested to see that one of its members is also a member of an athletic booster program. In this situation, you can set up the athletic booster program as a membership program in which payments are made in another system. For these programs, you set up and can track basic information about the membership, but not things like benefits or add-ons.

When you add a program, on the General tab, you can specify whether payments are made in this system or in another system. After the program is saved, you cannot edit this information.

Membership Expiration Dates

We've updated the default expiration dates for memberships in a program to include a period of time in which the membership is extended and the expiration date is "pushed" to the next period.

To expire the memberships for the program on the same day and month every year, select **Is fixed** on the Renewals tab and enter the month and day in the **Expiration date** column. In the **Push to next period after** column, enter the membership join date that extends the membership until the next expiration date. For example, you enter 12/31 in the **Expiration date** column. If you enter 09/01 in the **Push to next period after** column, the expiration date for a constituent who joins on or after September 1 is December 31 of the following year, not the current year. You can enter multiple rows of dates in this grid if you want to expire and push multiple dates throughout the year.

Membership Card Format

For a membership program, the membership card format is no longer required.

Membership Dues Batch Enhancements

In the Membership Dues Batch, new constituents are now saved to the batch row. When the batch is committed, the new constituent records are actually created. Previously the constituents were created as they were entered.

The Membership Dues batch now supports credit card rejection handling. When you add a credit card processing process in *Revenue*, you can specify settings for how to handle card rejections. For more information about rejection handling, see the *Revenue Guide*.

Constituent matching is now available for Membership Dues batches. For information about constituent matching, see the *Constituent Duplicates and Merge Tasks Guide*.

Edit Membership ID

We have added the ability to edit the membership ID from the constituent membership page. To customize a membership ID for a constituent, on the constituent's membership page, click **Edit membership ID** under **Other tasks**. The Edit membership ID screen appears.

Membership Campaigns

We have added the ability to add a campaign to a membership program. After you add a membership program, you can associate campaigns with it on the Rules tab. On the Rules tab, click **Edit campaigns**. By default, the campaign will be associated with any membership revenue for the program.

Memberships and Recurring Gifts

For recurring memberships, you can choose to create the recurring gift, but not make the first payment. However, you can still enter credit or debit card information. The token will be saved for future recurring gift payments for the membership.

Membership Form Part

The Membership Form part includes a membership section on your website to solicit new members for your organization or for existing members to renew their memberships. When you design the part, you can include multiple membership programs. You select to include information such as the membership levels and terms.

Note: Annual dues-based programs purchased on your website must be paid in full . Lifetime dues-based programs purchased on your website can be paid in full or can use installment plans. Other types of programs are not available to use on your website.

For the website administrator who sets up the part:

- Step 1, Pick your membership programs: A list of available membership programs is displayed. You select the ones you want to be available for a user to pick on your website. You can also change the text for the names and descriptions to alter how they will appear on the website. Then you set up payment part information.
- Step 2, Configure programs: For each program, you select the levels that will be included, as well as the terms, if applicable. You also select the payment options members will have to choose from, such as pay in full, if applicable.
- Step 3, Save the part: After you configure your programs, you save the part and can add it to a page.

After you add the part to a page, the membership program, level, and term combinations appear as buttons for website visitors to select and buy.

Also in this version, you can download membership transactions for the new Membership Form part into Membership Dues Batches. To process transactions from the new Membership Form part, you must create a batch template with the Membership Dues Batch batch type and then select that template for membership transactions on the batch assignment settings in *Web*. Support for the old Membership Form part ended with the 2.93 release, so if you upgrade from a version prior to 2.93, we recommend that you delete any existing Membership Form parts and create new parts as necessary.

Note: In order to download membership transactions from non-logged in users on your website, you must use a membership dues batch that does not have the **Bill to** field marked as required.

Membership Terms in Query

Prior to version 2.93, membership terms were associated with levels and were restricted to 1, 2, 3, 4, 5, or 10 years or Lifetime. When you queried on membership level terms, those were the only possible term lengths. In 2.93, we redesigned membership programs to offer more flexibility with both the types of membership programs (such as annual, recurring, and lifetime) as well as the terms. With this release, in *Query*, we have hidden the **Term** field in the **Membership Level Term** query node and replaced it with the **Term length** field.

The hidden **Term length** field will still work in your existing queries built on the old membership functionality. However, when you set up and use the new membership functionality, you will now use the **Term length** field in your queries to give you the most accurate results.

Blackbaud CRM Mobile

To more efficiently extend the reach of your ***Blackbaud CRM*** capabilities, we made several enhancements to ***Blackbaud CRM Mobile*** (formerly ***Blackbaud Mobile***).

With ***Blackbaud CRM Mobile***, from a mobile device, you can search for and update constituent records, check KPIs for up-to-the-minute numbers, or view prospect information and file contact reports all while on the go. You don’t need to install anything on your mobile device; all you need is a browser.

To access ***Blackbaud CRM Mobile***, click **Mobilize** on your ***Blackbaud CRM***start page. Your login credentials are your user name and password for ***Blackbaud CRM***. Note that your application user must be in a system role that has the Access Mobile Features System Privilege feature permission granted. When your web browser is accessed and recognized from a mobile device, the available mobile features display.

Note: If your device isn't recognized or if you access the Mobilize page from a personal computer, a list of urls for the available mobile features displays.

Feature Permissions

To help ensure consistency and accuracy with mobile permissions, we added the following permissions that you can now associate with a system role:

- Mobile Constituents Edit – Users can view and update constituent details in a mobile environment.
- Mobile Constituents View – Users can view constituent details in a mobile environment.
- Mobile Prospects Edit – Users can view and update prospect details in a mobile environment.
- Mobile Prospects View – Users can view prospect details in a mobile environment.

Constituents

To help you easily work with constituent details, we added the new **Constituents** mobile feature.

- Use **Constituent Search** to search for constituent records. The available search fields are **Name** (search by name or lookup ID) **City**, **State**, and **Zip code**. Click **Search** to view a list of results.
- Use **Recently Accessed** to view recently accessed constituent records. Any recently accessed record (viewed through ***Blackbaud CRM Mobile*** or ***Blackbaud CRM***) displays in the Recently Accessed list.
- Use **Favorites** to view records you select to appear in your Favorites list. To select a record as favorite, from a constituent record, click the star next to a constituent name. When you add a favorite for a constituent record in ***Blackbaud CRM Mobile***, it displays as a shortcut in ***Blackbaud CRM*** (and vice versa).
- On a constituent record, under **More information**, click **Attributes** to view a list of attributes associated with the record. From the Attributes page, click **Add** to add a new attribute including start and end dates, and comments. To edit details of an existing attribute, under **Tasks**, click **Edit attribute**. To delete an attribute, from an attribute record, click **Delete attribute**. A confirmation message displays.
- On a constituent record, under **More information**, click **Interactions** to view a list of interactions associated with the record. From the Interactions page, click **Add** to add a new interaction including a contact method and status. To edit details of an existing interaction, under **Tasks**, click **Edit interaction**. To delete an interaction, from an interaction record, click **Delete interaction**. A confirmation message displays.
- When you add a constituent interaction, the list of sites that displays for the **Site** field is based on user rights as outlined in the following scenarios:

  When a user has rights to access 50 sites or fewer, all sites display as choices in the **Site** field.

  When a user has rights to access more than 50 sites and is not associated with a default site, no choices display for the **Site** field. In this instance, to apply a site to an interaction, the user must edit the interaction in ***Blackbaud CRM***.

When a default site is assigned to a user, the default site automatically displays in the **Site** field. Note that if a user wants to select a site other than the default site, and the user has rights to access more than 50 sites, the user must edit the interaction in ***Blackbaud CRM***.

As a reminder, the **Site** field only displays sites to which a user has access.

- In ***Blackbaud CRM***, when a constituent record displays a deceased status in the summary section, a deceased status now displays under the constituent name when you access the constituent record from the **Constituents** mobile feature.

Prospects (Formerly Mobile Major Giving)

We made several enhancements to the **Prospects** mobile feature.

- You can now search for prospects on your mobile device. From **Prospects**, click **Prospect Search** to access a search page that includes the following fields: **Name**, **Lookup ID**, **City**, **State**, and **Zip code**. The search results display the prospect name, prospect manager name, and primary manager name.
- You can now view and edit a prospect plan step’s status. From a planned or pending step in **Prospects**, you can view a step’s status under **Details**. Under **Tasks**, click **Edit step** where you can update the status as well as other details, and save your changes. A message displays to indicate your data saved successfully. You can view and edit steps through the **Pending Steps** and **Prospect Plans** areas of the **Prospects** mobile feature.
- In ***Blackbaud CRM***, when a major giving prospect record displays a deceased status in the summary section, a deceased status now displays when you access the prospect record in ***Blackbaud CRM Mobile***.

Lists (Formerly Mobile Query)

For this release, we renamed **Mobile Query** to **Lists**.

With **Lists**, you can continue to view a list of queries which have been marked **Make this query available in Mobile Query** on the Options tab of the query properties screen. Once marked as “mobilized,” any query you have rights to access in ***Blackbaud CRM*** is available from your mobile device.

Constituents Near Me

As of this release, the **Constituents Near Me** mobile feature is no longer available. This feature may be enhanced for a future release.

Prospects

The following *Prospects* enhancements are available in ***CRM 3.0***. For more information about these features, see the *Prospects Guide*.

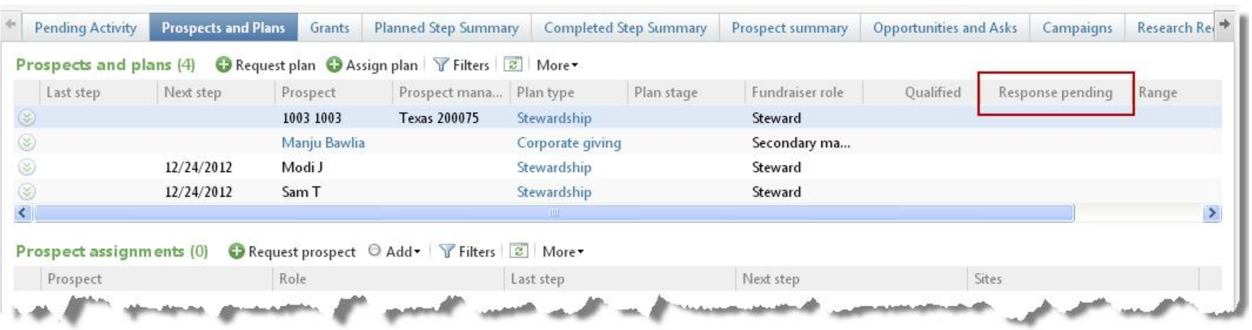
Major Giving Management

With this release, we made it easier to track gift opportunities during the different phases of the major giving effort. Previously, you could have only one qualified opportunity for each major giving plan. You can now have multiple qualified opportunities on each major giving plan, which will give your major giving officers and managers more flexibility in tracking your fundraising efforts and plans. This also eliminates the need to create additional plans to accommodate multiple qualified opportunities.

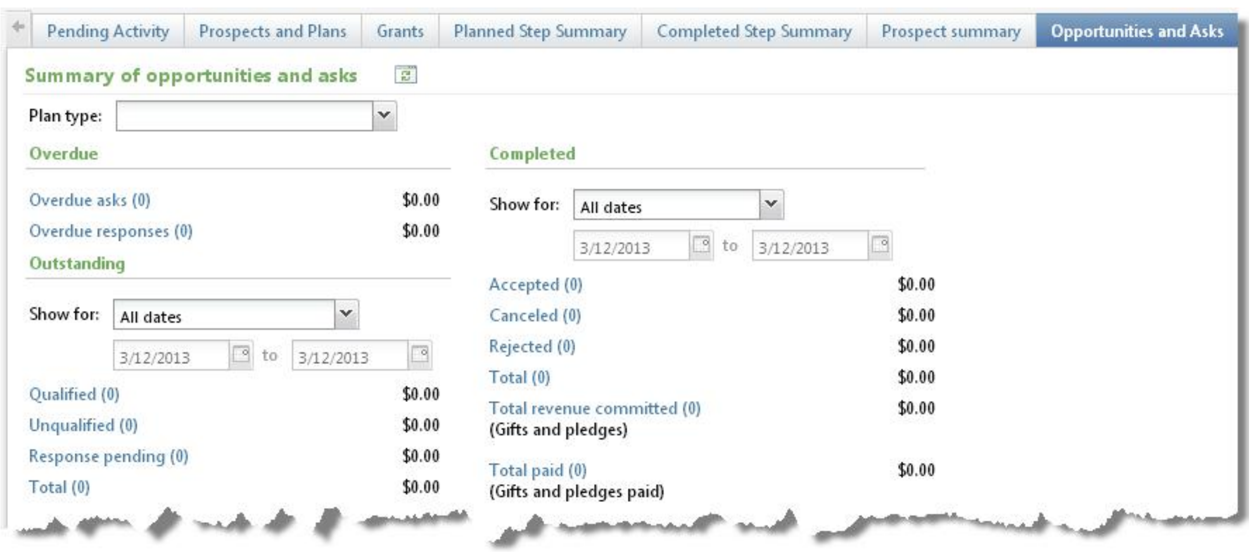
To present this information clearly, we revamped how we display opportunity amounts and counts in the plan detail pane on the Plans tab. We also made adjustments to the top of the Plan page to display this information.

On the Opportunities tab, we added an expandable list that you can sort to display the information you need. We also made small cosmetic changes to the top of the Opportunities page and Fundraiser page, so that you can quickly and easily locate plan information.

On the Prospects and Plans tab, we added a Response pending column. We also added a details pane under the datalist.



On the Opportunities and Asks tab, we added hyperlinks to opportunity statuses and include the count information.

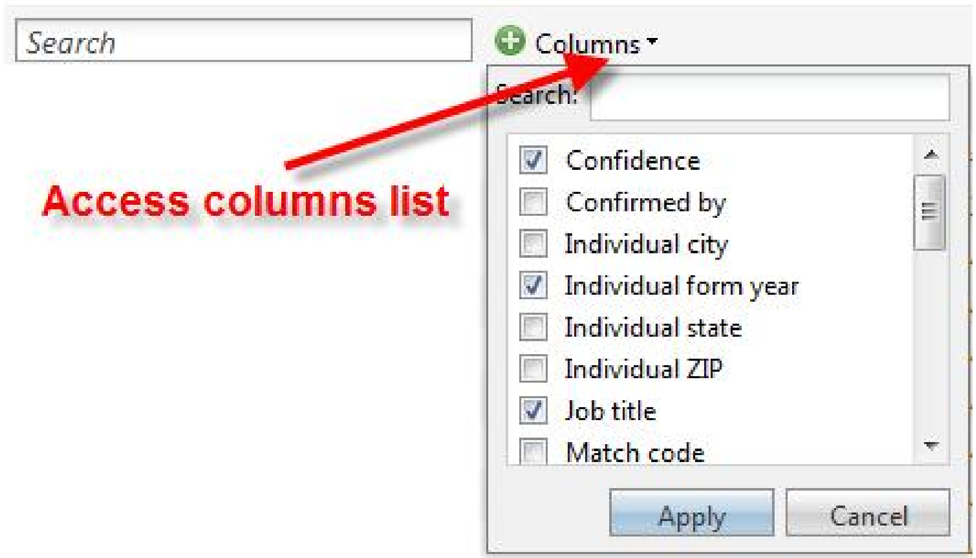


For more information about these changes, see the ***Prospects Guide***.

Manage Columns Displayed in Grid

The powerful List Builder feature allows your to filter and customize information included in a grid's data lists. This feature is available in sections included on the Assets, Giving, and Affiliations tabs of a prospect's Wealth and Ratings page.

You can control the columns displayed in the expanded grid by expanding the grid and clicking the drop-down button next to **Columns**.



A screen appears for you to select which columns to show and hide. Unselect any columns you do not want displayed and select those you do want to see in the grid. Click **Apply** and your changes display in the grid.

You can also:

- By dragging and dropping columns move them around so those you use most display and those you don't often use are to the far right, accessed through a scroll bar
- Tighten up each column so the width of the column is consistent with the width of the data included in the column. To do this:
  - Hover your cursor on the column border until you see two parallel lines with an arrow on each side
  - Click your mouse. The columns tighten up.
- To allow even more space to view your column settings, you can also collapse the Explore bar displayed on the left side of the application page

Once you get the columns customized to your needs, the application remembers your changes so you see the same view every time you access this list; however, if at any point you want to return the list view to the application's default settings, simply click the **Reset Grid** button.

Note: Filter settings are lost during the upgrade process. You will have reset after the process completes.

Use Search and Filter Features

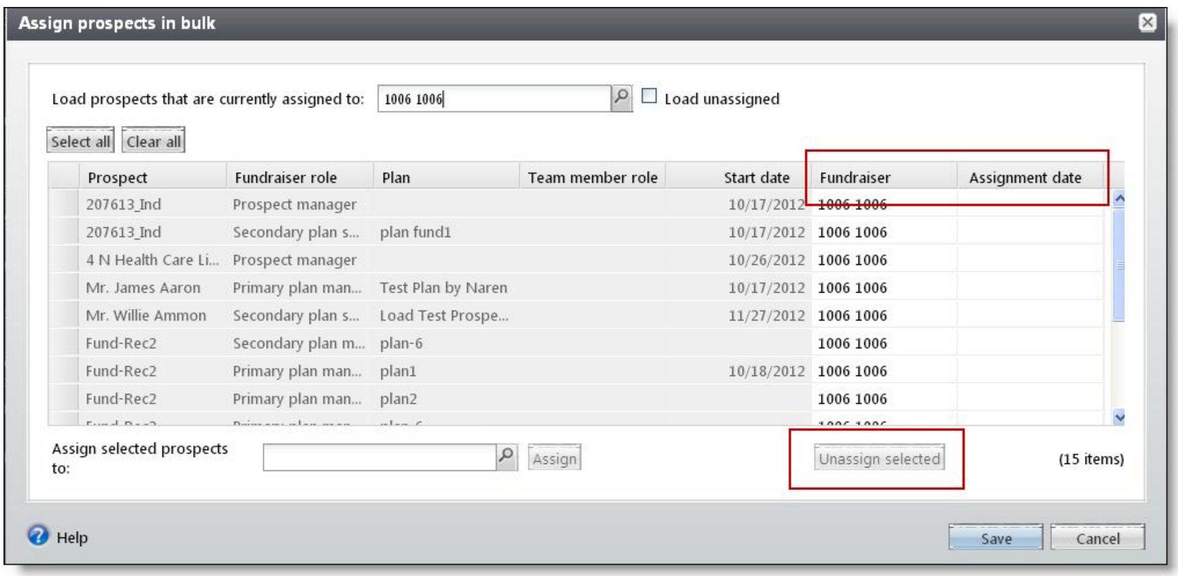
- **Search** field: Quickly search for content included in the grid. The search is based on columns displayed, so make sure to open all columns you want to include before running the search.
- Filter options: Click on the filter icon included with each column head. A screen appears allowing you to

enter your filtering criteria. If at any point you want to remove your filters, click the **Clear all filters** button at the top of the section. You can also click the red "X" that displays at the top of a filtered column if you want to remove filters from just that column. Finally, remember that the filters are sticky; they remain even after you move to another tab/record.

Unassign Fundraiser

With this release we added the **Unassign selected** button to the Assign prospects in bulk form. You can use this button to unassign a fundraiser from prospects or plans. To unassign the fundraiser, highlight the prospects and plans in the grid you want unassigned and click **Unassign selected**.

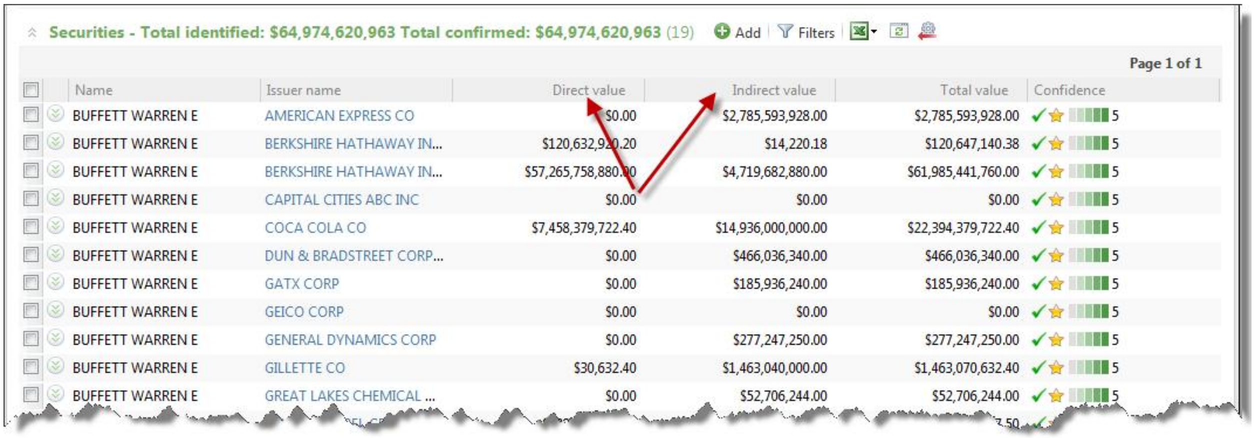
The **Assign to** column has been renamed **Fundraiser**. The **Assignment date** column in the grid tracks the removal or unassignment date of the current fundraiser. This column populates when a new fundraiser is assigned or removed in the row.



You can also remove a fundraiser from prospect or plan assignments from this form.

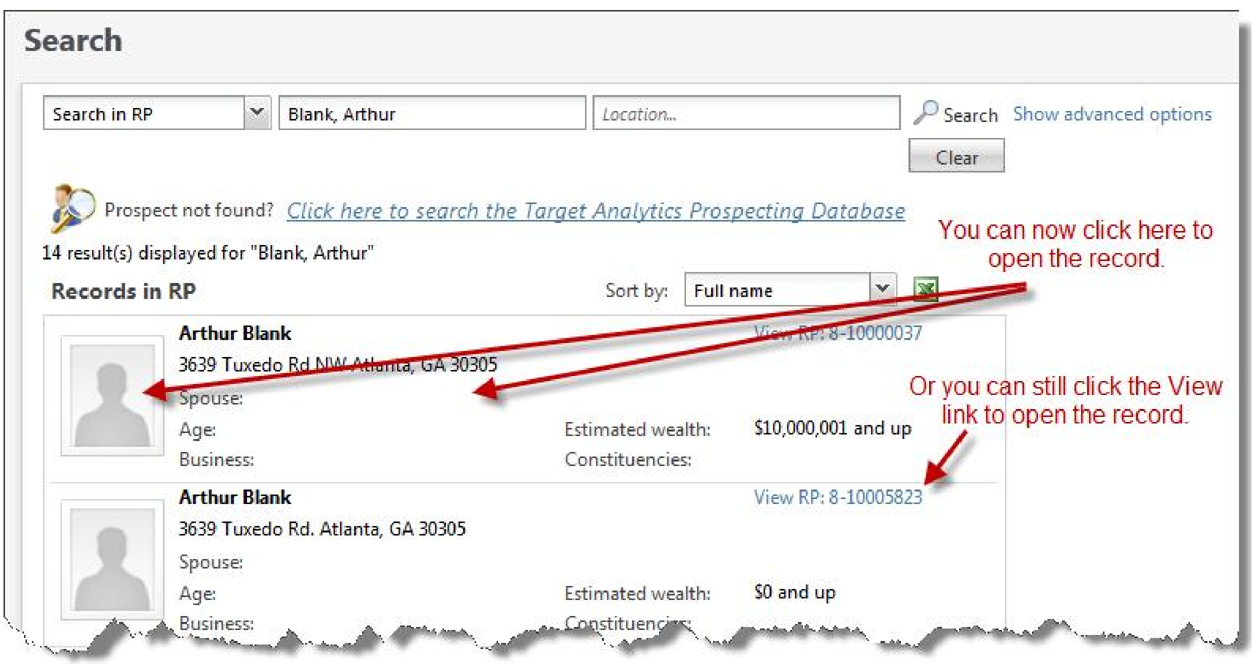
Added New Columns to Securities Grid

We added two new columns to the **Securities** grid: **Direct value** and **Indirect value**. We also removed the **Relationships** column from the grid. You access this grid by selecting the Assets tab on a prospect's Wealth and Ratings page.



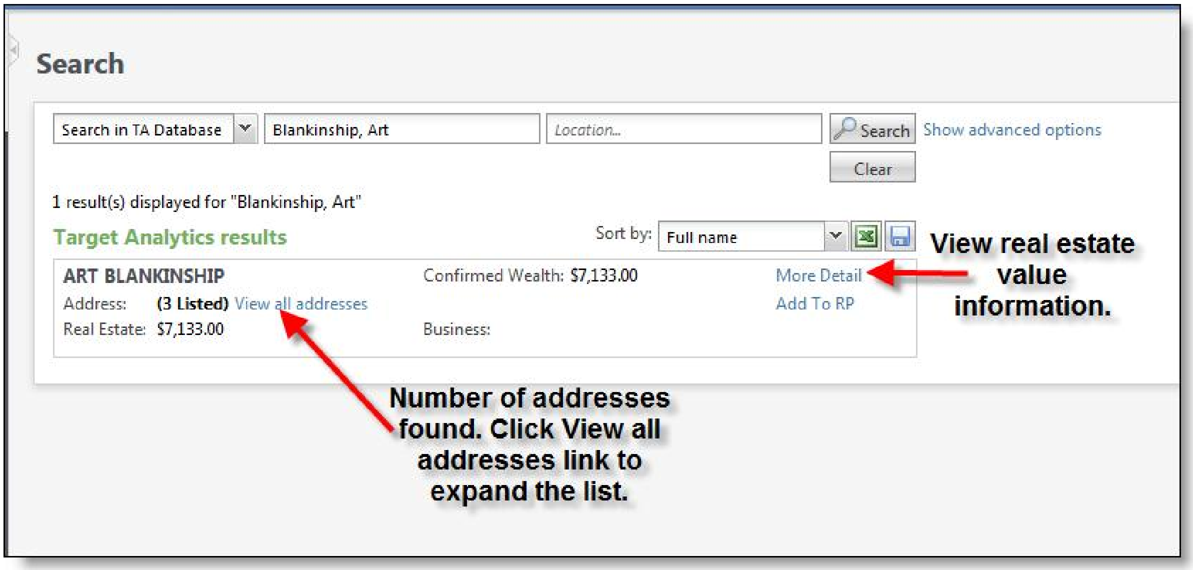
Improved Search Page Usability

From the prospect Search page in **Prospects**, you can now access prospect records by simply clicking in the result row or image. You access this page by selecting **Search**, under **Prospect research** on the Prospects page.

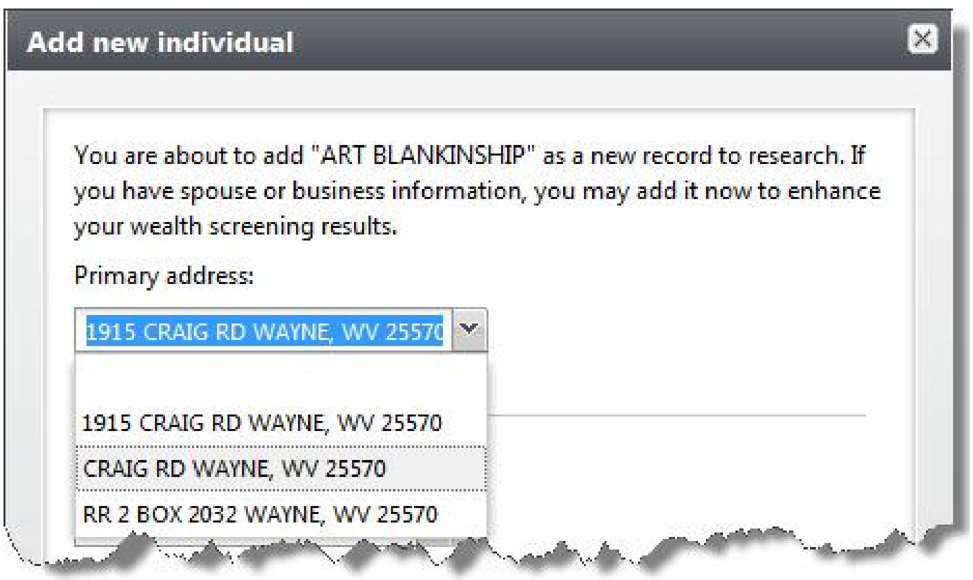


Improved Target Analytics Search

We have streamlined searches of the Target Analytics database. Now, if several addresses are located for the same prospect, the prospect displays only once in the search results and all located addresses are rolled up with the single prospect.



Click **Add to RP** to add the prospect to your ***ResearchPoint*** database. The Add new individual screen displays. If the prospect returns with several addresses, on the Add new individual screen, you can select which address should be the **Primary address**.



When you click **Save**, the new prospect's Wealth and Ratings page displays. Select the Biographical Information tab and expand the **Contact information** section. The address you selected as primary displays here with the "Primary" designation along with any other address information locate. The application can save up to five addresses.

Wealth Capacity Default Formula Changed

We updated the property value used in the calculation. It now uses the largest available property valuation. This update is to only the default formula included with **ResearchPoint**, not any formulas you have created and saved. In addition, we do not recalculate your content with the new formula during the upgrade process. Only new searches will use the updated default calculation. You can, however, at any time choose to recalculate your existing content and apply the new formula.

Improved Subscription Status Screen

The Subscription status screen, accessed from the Wealth and Ratings Data page, now includes information on the number of Prospecting Database searches used.

Warning: Access to the Prospecting Database search functionality and the number of searches allowed depends on your subscription level.

NOZA Confidence Settings Changed

NOZA matches based on an address are now set to a higher confidence rating. You can always change the default confidence settings. From the Prospects page, select **Edit Confidence settings**.

Note: Records will be moved to a confidence rating of 4/5 during the upgrade; however, no existing records will be auto-confirmed. Only new records returned from a new search are auto-confirmed.

- P02/S02 and P04/S04 match codes are by default auto-confirmed
- P07/S07 match codes have moved up to a confidence rating of 4

List Major Giving Capacity Value on Main Wealth Page

The **Major giving capacity** value and **Estimated wealth value** now display on the **Wealth Summary** page in the **Giving Capacity** section.

New Indicator on Wealth Summary Page

We added a "New" icon to the right of each asset/indicator on the Wealth Summary page and the summary sections of the Assets, Giving, and Affiliations tabs. This allows you to easily see where you have new data after a wealth search is complete. The "New" status stays until someone navigates to the tab containing the new information.

Default Interaction Owners

We have made an enhancement to streamline data entry when you add interactions. If a constituent is linked to a system user and that user adds an interaction to any constituent record, the interaction owner is automatically defaulted to the user adding the interaction. The user can change the interaction owner manually if needed.

Pending Activity for a Fundraiser

We have enhanced the Pending Steps tab on a fundraiser’s record to make it a more comprehensive view of all pending activity. Previously, on the Fundraiser page for a constituent, there was a Pending Steps tab which listed any pending steps associated with the fundraiser for any prospect plans. Now, the tab is named Pending Activity and has an **Include general interactions** checkbox. When the checkbox is marked, the Pending Activity tab shows the same pending steps as before, but also includes any other pending interactions owned by the fundraiser.

Historical Prospect Plans

When you view a prospect plan, you can mark it historical if you no longer need it, as long as all associated opportunities are marked accepted, canceled, or rejected. However, when you viewed a prospect's list of plans on the Plans tab of a prospect record with the **Include historical plans** checkbox marked, there was no clear indication of which plans were current and which were historical. We have enhanced this list of plans so that any historical plans are now displayed in italics. If you click on a historical plan to view it, a red X and the word "Historical" are also displayed at the top of the plan record.

Target Analytics Model Scores and Ratings

On the new Target Analytics Model Scores and Ratings Results page, you can view model score projects and presentations uploaded by Target Analytics. This provides a comprehensive view of model scores and ratings details. A project consists of a score or group of scores accompanied by presentations that help nonprofit organizations understand those scores. From *Prospects*, click **Target Analytics model scores and ratings results** to view this page.

You can view model scores and ratings details such as the number of constituents with scores, model score descriptions, and if the score was recalibrated. You can also view presentation files such as PowerPoint presentations.

Merge Model Scores

You can now merge model scores and ratings associated with the source and target constituents when you merge duplicate constituent records. Model scores and ratings from both the source and target records will be retained on the merged record. All ratings values are retained when multiple values are allowed for the rating attributes category. When both records have a score for the same model or single-value rating, only the score from the target will be retained.

Presentation Files

Users with proper administration rights can now add presentation files, such as PowerPoint files, to model scores and ratings projects.

To add presentation files, from *Prospects*, click **Manage model scores and ratings**. On the Target Analytics Import Files and Projects tab, under **Projects, distributions, and presentations**, click **Add**. You can upload up to five files. The file size limit is 28 megabytes. If you need additional file size, contact your web server systems administrator. Presentation files can then be viewed on the Target Analytics model scores and ratings results page in *Prospects*.

Sort Order in Reports

The Prospect plan analysis and Opportunity pipeline reports are now sorted by last name first.

You can view these reports in *Prospects*.

Query and Export

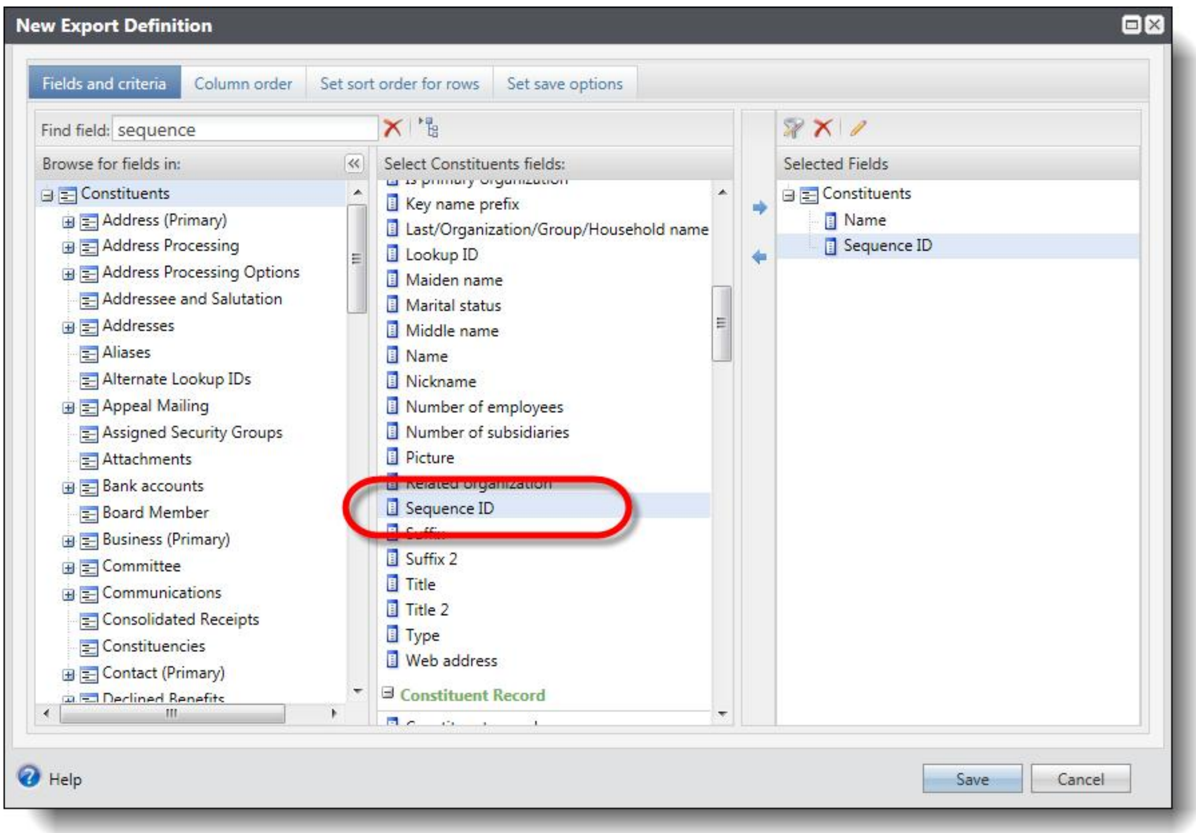
The following *Query* enhancements are available in ***CRM 3.0***. For more information about these features, see the *Query and Export Guide*.

Constituent Query: Social Media Accounts

When you use Constituent Query, you can now use the new Social Media Accounts node to include the account type, do not contact, information source, profile page URL, social media service, and user ID fields. For information about social media and social networking accounts, see the *Constituents* guide.

Constituent Export: Sequence ID

Constituent export definitions now include the **Sequence ID** field.



Use this field to import constituents into Blackbaud Internet Solutions as website users. Previously, you had to create a joint query in SQL server and add a header with the field names to import users because the field did not exist in *Export*.

Constituent Query: Model Scores

When you create constituent queries, users can now see additional model scores and ratings information such as maximum score, when the score was updated last, model name, and origin. This information is also displayed on the Prospect Research and Research Group reports, as well as research groups and households.

Banking Systems and Constituent Query

For a constituent query, we added the following fields to the **Bank accounts** and **Financial institution** nodes to help streamline the configuration and management of the banking systems your organization uses: **Banking system**, **BIC**, and **Bank code**.

Note: Banking systems are a new feature for this release. For more information about banking systems, see Banking Systems and Treasury on page 45, Banking Systems and Constituents on page 10, and Banking Systems and Enhanced Revenue Batch on page 7.

Payment Query: New Credit Card Fields

To allow for more convenient retrieval of **Blackbaud Merchant Services** credit card data, we added two **Blackbaud Merchant Services** credit card fields to the Payments query in ***CRM***.

In the Payments query, the **Net amount** and **Fee** fields now display under **Credit card** in the **Select Payments fields** pane. In **Blackbaud Merchant Services**, these fields currently display on the Details screen for a transaction. Note that these fields display in the Payments query after a disbursement has processed in **Blackbaud Merchant Services**, and the credit card transaction has settled in ***CRM***.

Note: In **Blackbaud Merchant Services**, credit card data is stored in transaction currency. When you view a Payments query in ***CRM***, the **Payment amount (transaction currency)** field displays in transaction currency as well. For consistent retrieval and reference of credit card transaction information, we recommend you include the **Payment amount (transaction currency)** field in a Payments query, which is available with *Multicurrency*.

Membership Terms in Query

Prior to version 2.93, membership terms were associated with levels and were restricted to 1, 2, 3, 4, 5, or 10 years or Lifetime. When you queried on membership level terms, those were the only possible term lengths. In 2.93, we redesigned membership programs to offer more flexibility with both the types of membership programs (such as annual, recurring, and lifetime) as well as the terms. With this release, in *Query*, we have hidden the **Term** field in the **Membership Level Term** query node and replaced it with the **Term length** field.

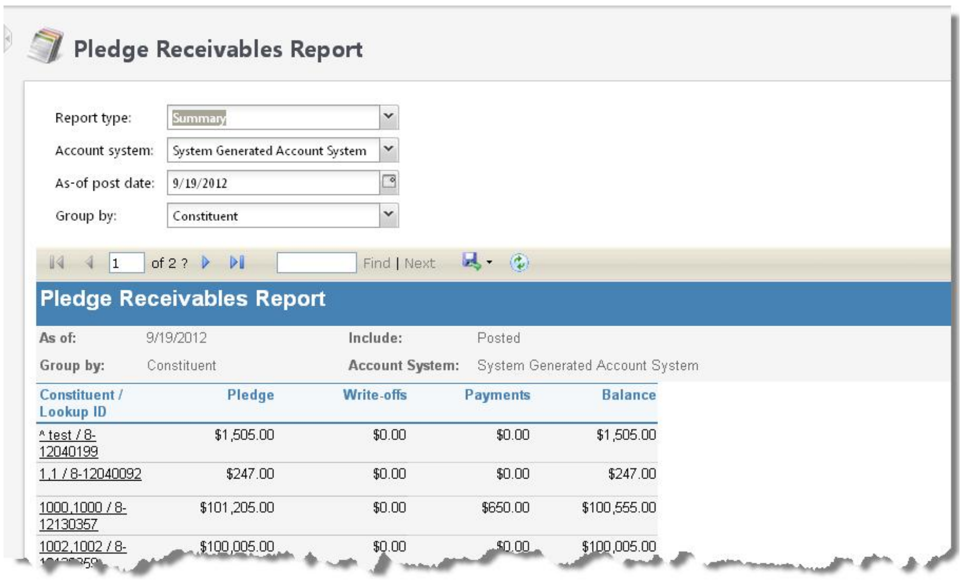
The hidden **Term length** field will still work in your existing queries built on the old membership functionality. However, when you set up and use the new membership functionality, you will now use the **Term length** field in your queries to give you the most accurate results.

Revenue

The following *Revenue* enhancements are available in ***CRM 3.0***. For more information about these features, see the *Revenue Guide*.

Pledge Receivables Report

Use the Pledge Receivables report to view the detail and total amount of your outstanding pledges. Only posted activity is included in this report. You can filter the report by constituent or designation, and include only pledges with specific characteristics, such as account system and as-of post date. For each pledge, you can view its constituent and designation, pledge date, Lookup ID, and Revenue ID. You can also view information about any balance, payments, and write-offs associated with each pledge.



Note: The purpose of this report is to reflect the detail and total amount of your outstanding pledges. Therefore, this report includes only posted activity. If you have pledges in your system marked as "Do Not Post," they will not appear on the Pledge Receivables Report.

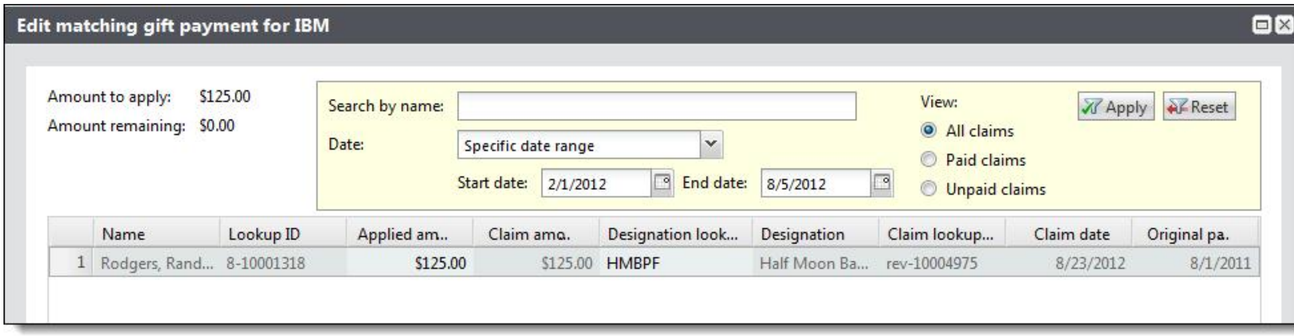
You can access the Pledge Receivables Report from the Revenue page under **Reports**. For more information about the Pledge Receivables report, see the *Reports Guide*.

Pledges and Receipt Amounts

We have changed the way the default receipt amount is calculated for pledges and pledge installments with benefits. Previously, the benefit amount did not affect the receipt amount of the pledge or pledge installments. Now, if a pledge has benefits, the amount of the benefit is subtracted from the receipt amount of the pledge or installments first. For example, you have a pledge with 12 monthly installments of $100 each. The pledge also includes benefits totaling $25. Previously, the default receipt amount for each installment was $100. Now, the benefit amount is included and affects the default receipt amount of the first installment. The default receipt amount for the first installment is now $75. The remaining installments have the default receipt amount of $100. You can still manually change the receipt amount if needed. When you upgrade, the receipt amount of paid installments will not be modified.

Edit Matching Gift Payments

You can now click **Edit matching gift payment** under **Tasks** on a payment record to edit matching gift payments. The new Edit matching gift payment screen makes it easier to correct errors made when the payment was originally entered by displaying lookup IDs, applied amounts, claim amounts, and other details. Previously, you could only edit matching gift claims on the Edit posted payment screen.



Direct Debit File Process

You should check any direct debit file processes created between versions 2.91 and 2.95 for incorrect financial processing dates and payments due dates. In some cases, the financial processing date was saved incorrectly or switched with the payments due date. This issue was corrected for version 2.96.

Revenue Record

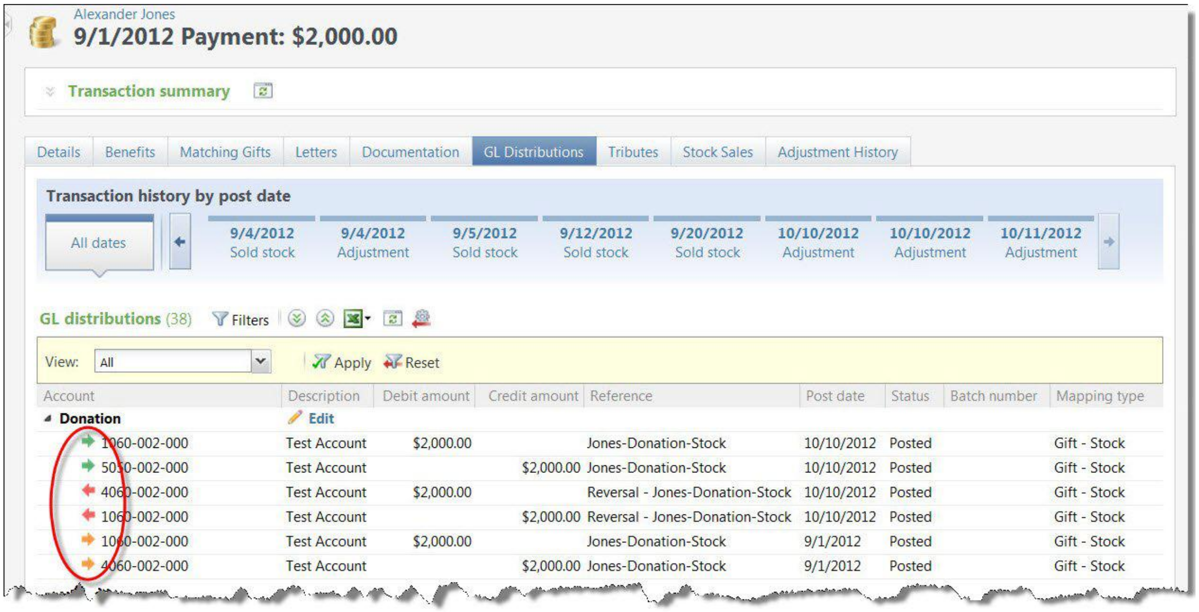
On a revenue record, you can now click the node next to **Transaction summary** to quickly expand or collapse transaction summary information, including status and payment method details.

GL Distributions Tab

We made several enhancements to the GL Distributions tab on the revenue record for payments, pledges, auction donations, planned gifts, and grant awards.

- The GL Distributions tab displays a timeline that lists original transactions and subsequent activity associated with original transactions, such as adjustments. For example, if you adjust a payment twice, the timeline displays the original payment as well as the two adjustments. All transactions in the timeline are listed by post date.

  In the timeline, under **Transaction history by post date**, click **All dates** to view transaction activity for all dates associated with the original transaction. Or, you can click each transaction activity separately for a more specific view. Transaction activity that occurs on the same post date is listed separately in the timeline. Note that posted and not posted transaction distributions display on the tab.
- Colored arrows display beside each GL distribution row, indicating current and reversal distribution activity associated with a transaction. Green signifies current GL distributions for a transaction; orange signifies GL distributions that have been reversed; and red signifies reversal GL distributions.



- We added the **View** filter to further specify the types of distributions you want to view on the tab.
- To promote a more streamlined interface, we removed the traditional grids that previously separated each distribution type. Now, distribution types are listed in a more unified way, separated by headers that reflect the distribution's application type. We also removed the term "GL distributions" from each distribution type header. For example, "Benefit GL distribution" now appears as "Benefit."
- If an alias exists for a transaction, the alias displays in the **Account** column (instead of the account number). The account alias associates the account number in the system with the account number in your third-party general ledger system. For more information about the account alias, see the *General Ledger Setup Guide*.
- If a transaction was entered using an enhanced revenue batch or revenue update batch, the batch number associated with the transaction displays in the **Batch number** column.
- The **Mapping type** column displays the type of revenue transaction, such as Gift – Stock.
- For sold stock distribution headers, the transaction date and amount display.
- Previously, reversal transactions were listed in a separate grid. With this release, reversal activity now displays under the distribution header of the original transaction. For example, when you edit a posted donation, the **Donation** distribution header appears and lists current distributions as well as reversal distributions. "Reversal" displays under the **Reference** column.
- To edit a distribution, you now click **Edit** next to a distribution header. Previously, **Edit distribution** displayed in the grid that separated each distribution type.
- To help ensure transactional integrity, we changed the way you can edit distribution information from the GL Distributions tab. For payment transactions such as original payments, you cannot edit the **Transaction type** or **Amount** information on the Adjust and Edit GL distribution screens. Only the **Account** and **Reference** fields are editable. You can, however, edit the transaction type or amount information from the transaction record, such as a payment or pledge.
- With *Multicurrency*, use the **Currency** filter to display a distribution's credit and debit amounts in either transaction, base, or organization currency. Note that gains and losses display in base or organization

currency, or both.

- If your organization uses multiple account systems and you have rights to view more than one account system, the account system associated with the transaction appears in the distribution timeline. Each site in your organization must be associated with an account system. If your organization uses only one account system, or if you have rights to view only one account system, the name of the account system does not appear.

Treasury

The following *Treasury* enhancements are available in ***CRM 3.0***. For more information about these features, see the *Treasury Guide*.

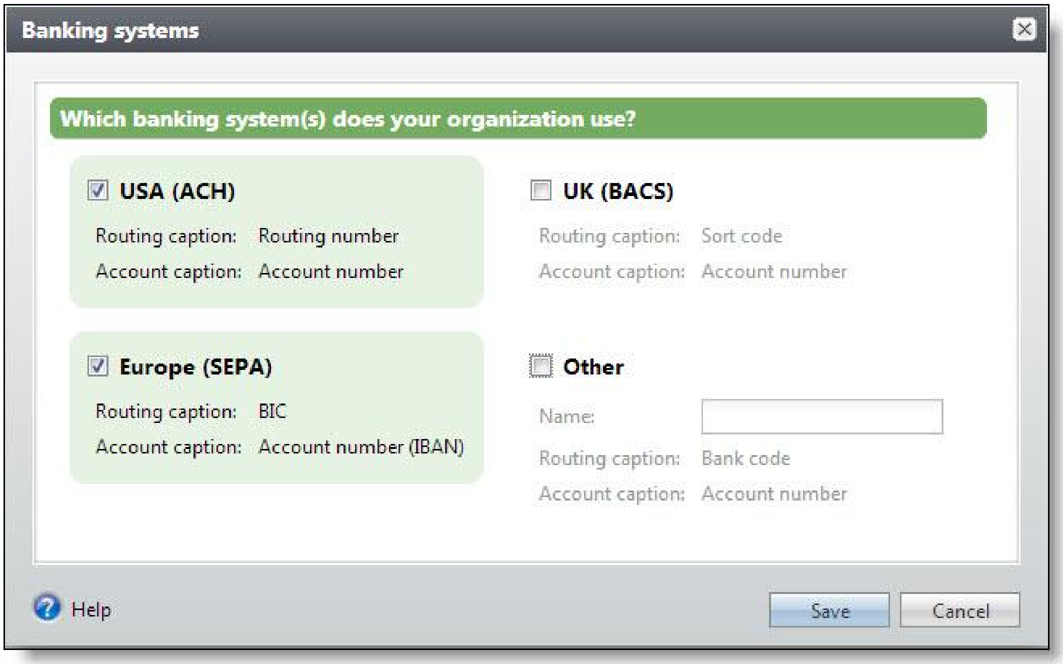
Banking Systems and Treasury

With this release, we introduce several enhancements that will eventually support full implementation of the Single Euro Payment Area (SEPA) banking system for direct debit transaction processing in a future release.

SEPA is a payment-integration initiative of the European Union designed to simplify bank transfers. The SEPA banking system option will be available in addition to the Automated Clearing House (ACH) banking system, which is currently supported. The following enhancements are now available to help you plan and prepare for SEPA implementation at a future time.

To help streamline the configuration and management of the banking systems your organization uses, on the Treasury page, we added a new **Banking systems** link.

Click this link to access a new Banking systems screen where you can select or deselect banking systems that your organization uses. The new screen includes the following banking system options: **USA (ACH)**, **UK (BACS)**, **Europe (SEPA)**, and **Other**.



USA (ACH) is the Automated Clearing House banking system. **Routing number** and **Account number** display in all related areas of the program where USA (ACH) is the selected banking system.

UK (BACS) is the Banks Automated Clearing System banking system. **Sort code** and **Account number** display in all related areas of the program where UK (BACS) is the selected banking system.

Europe (SEPA) is the Single Euro Payment Area banking system. **BIC** and **Account number (IBAN)** display in many related areas of the program where Europe (SEPA) is the selected banking system. In some areas of the program, such as the bank account page, when Europe (SEPA) is the selected banking system, the **Account number** column header does not change. **BIC** signifies the bank identifier code.

Other is used to create a user-defined banking system. In the **Banking system** name field, enter the name of the banking system you want to create. **Bank code** and **Account number** display in all related areas of the program where the user-defined banking system is selected.

Warning: You cannot disable a banking system that is linked to a constituent financial institution, bank account, or bank.

Note: When more than one banking system is enabled, the **Banking system** field as well as fields associated with the enabled banking system, such as **Routing number** and **BIC** fields, display throughout the program. When only one banking system is enabled, these fields do not appear.

We made additional enhancements throughout *Treasury* to help you manage all information related to banking systems:

- On the Add a bank screen, we added the **Default banking system** field. Use this field to select a banking system to associate with a bank. When you select a banking system, the routing field that displays is based on the banking system you select. For example, when you select "USA (ACH)," the **Default routing number** field displays.
- On the Add a bank account screen, we added the **Banking system** field. Many of the fields on this screen display differently depending on the default banking system you select. For example, if Europe (SEPA) is an enabled banking system, and you select it in the **Banking system** field on this screen, the **Account number (IBAN)** field appears.
- On the Manage Bank Accounts page, we added the **Banking system** column. In addition, the fields associated with each enabled banking system, such as routing information fields, display on the page to indicate information specific to each banking system. The **Banking system** column only displays when more than one banking system is enabled.
- On a bank account record, we added default banking system information in the summary section.
- On the Bank Search screen, the **Routing number** field displays differently depending on the enabled banking systems. For example, if US (ACH) and Europe (SEPA) are enabled banking systems, the **Routing number** field now displays as **Routing/BIC**. The **Results** grid now displays the routing number and BIC fields associated with the enabled banking systems.
- On the Bank page for an organization with an active constituency of "Bank," we added the ability to edit default banking information.

  On the General tab, click **Edit** on the action bar to access the Edit default banking information screen. From this screen, you can specify a different banking system and routing information. Note that the routing field that displays is based on the banking system you select.

  On the Accounts tab, we added the **Banking system** column. In addition, the fields associated with each enabled banking system display on the page to indicate information specific to each banking system. The **Banking system** column only displays when more than one banking system is enabled.
- On the Deposit report, depending on the banking system associated with the deposit, routing number

and BIC information may display.

Volunteers

The following *Volunteers* enhancements are available in ***CRM 3.0***. For more information about these features, see the *Volunteers Guide*.

Volunteer Schedule Report

The Volunteer Schedule Report is now sorted so that the most recent date is at the top. Jobs with the same date are now sorted by start time.

To view this report, go to *Volunteers* and click **Volunteer schedule**.

Web

The following *Web* enhancements are available in ***CRM 3.0***. For more information about these features, see the *Web Transactions Guide*.

In addition to the CRM enhancements in *Web*, ***Blackbaud Internet Solutions*** includes new CMS features in ***3.0***. For information about these features, see ***Blackbaud Internet Solutions*** New Features Guide.

Blackbaud Internet Solutions Batches

In ***Blackbaud CRM 3.0***, several enhancements improve the batch process for the web transactions that you download from your ***Blackbaud Internet Solutions*** website.

First, donation and signup transactions are upgraded to use batch templates with the Enhanced Revenue Batch and Constituent Update Batch batch types when you download donations and signups. These batch types replace the BBIS Donation Transaction Batch and BBIS Signup Transaction Batch batch types, which can no longer accept downloaded transactions. This enhancement means that after you upgrade to ***Blackbaud CRM 3.0***, you must perform manual steps such as creating new batch templates before you can resume downloading transactions. For information about these manual steps, please review the upgrade path instructions on our website.

> ***Tip:*** We recommend that before you upgrade, you commit all uncommitted donation and signup batches. After the upgrade, the program temporarily stops downloads for web transactions, and you must delete any uncommitted donation or signup batches before you resume processing transactions. Deleting the uncommitted batches does not lose data from website users because the program returns transactions to a pending download state. However, any edits that were made to data in the batches will be lost, so we recommend that you commit these uncommitted batches before the upgrade.

For information about updates to the Enhanced Revenue Batch and Constituent Update Batch batch types for this release, see Enhanced Revenue Batch on page 6 and Constituent Batch and Update Batch on page 5.

Also in this version, you can download membership transactions for the new Membership Form part into Membership Dues Batches. To process transactions from the new Membership Form part, you must create a batch template with the Membership Dues Batch batch type and then select that template for membership transactions on the batch assignment settings in *Web*. In order to download membership transactions from non-logged in users on your website, you must use a membership dues batch that does not have the **Bill to** field marked as required. Support for the old Membership Form part ended with the 2.93 release, so if you upgrade from a version prior to 2.93, we recommend that you delete any existing Membership Form parts and create new parts as necessary. For information about the new Membership Form part, see Membership Form Part on page 48.

And finally, the new release also updates batches for event registrations and profile updates so that you can now view and edit those ***Blackbaud Internet Solutions*** batches in the web-based version of ***Blackbaud CRM***. Previously, you could commit these batches in the web-based version, but to view or edit transaction details, you had to access the batches in the click-once version of the program that you access from the program's Start page by clicking **Smart Client** instead of **Blackbaud CRM**. Now you can view, edit, and commit BBIS Event Registration Transaction Batches and BBIS Profile Update Transaction Batches in both the web-based and click-once versions of the program.

Membership Form Part

The Membership Form part includes a membership section on your website to solicit new members for your organization or for existing members to renew their memberships. When you design the part, you can include multiple membership programs. You select to include information such as the membership levels and terms.

Note: Annual dues-based programs purchased on your website must be paid in full . Lifetime dues-based programs purchased on your website can be paid in full or can use installment plans. Other types of programs are not available to use on your website.

For the website administrator who sets up the part:

- Step 1, Pick your membership programs: A list of available membership programs is displayed. You select the ones you want to be available for a user to pick on your website. You can also change the text for the names and descriptions to alter how they will appear on the website. Then you set up payment part information.
- Step 2, Configure programs: For each program, you select the levels that will be included, as well as the terms, if applicable. You also select the payment options members will have to choose from, such as pay in full, if applicable.
- Step 3, Save the part: After you configure your programs, you save the part and can add it to a page.

After you add the part to a page, the membership program, level, and term combinations appear as buttons for website visitors to select and buy.

Also in this version, you can download membership transactions for the new Membership Form part into Membership Dues Batches. To process transactions from the new Membership Form part, you must create a batch template with the Membership Dues Batch batch type and then select that template for membership transactions on the batch assignment settings in *Web*. Support for the old Membership Form part ended with the 2.93 release, so if you upgrade from a version prior to 2.93, we recommend that you delete any existing Membership Form parts and create new parts as necessary.

Note: In order to download membership transactions from non-logged in users on your website, you must use a membership dues batch that does not have the **Bill to** field marked as required.

Start and Stop Automatic Downloads

On the Pending Transactions page in *Web*, you can now start and stop the automatic download process as necessary for web transactions from your ***Blackbaud Internet Solutions*** website. To access this option, go to *Web* and click **Manage web transactions** under **Web transactions**.

On the Web Transactions page, a new configuration task now appears under **Tasks**. When the automatic download process is running, you can click **Stop download process** to stop the automatic downloads of web transactions. And to resume automatic downloads, you can click **Start download process**

Sponsorship Form Part

We made two additions to the Sponsorship Form part for online payments. There are now options for quarterly and semi-annually payment frequencies. Also, if your organization uses multiple general ledger account systems, the **Account system** field now appears under **Payment Setup**. In the field, select the GL account to post sponsorship payments to.

Address Create Date

In the ***2.94*** release, the program assigned start dates to addresses downloaded from Blackbaud CRM websites. In this release, the feature was removed to allow you to specify address start dates.

If you do not specify start dates, the program assigns address creation dates as start dates. Start dates appear in italics on the Contact tab of constituent records when the program uses creation date values.

International Address Support

Blackbaud Internet Solutions parts now use the address field labels and formats that you configure for countries in Blackbaud CRM from *Administration.* As a result of the enhancement, the address fields that appear on forms correspond to the countries that users select. The address configurations also appear anywhere you include the Formatted Address merge field.

Previously, formatting was only available for the United States, United Kingdom, Canada, New Zealand, and Australia. When users selected other countries, the program used the labels and formatting for the United States.

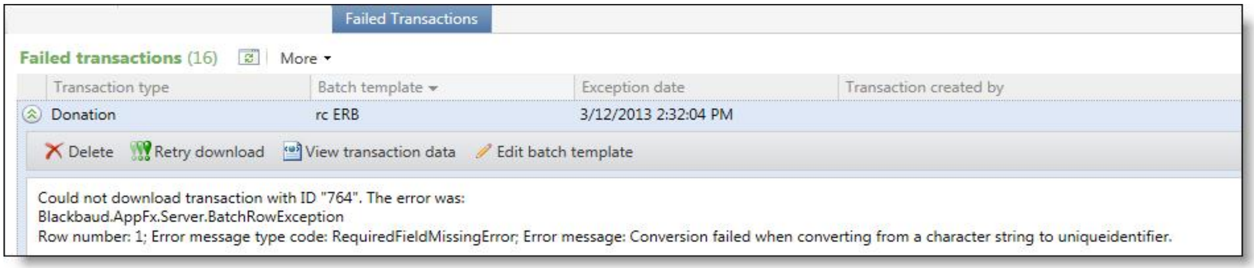
The change applies when address information is collected or shown with the following parts:

- Advanced Donation Form
- Donation Form
- Event Registration Form

  Note: The change applies to addresses for registrants and event guests.
- Membership Form
- Payment Part 2.0
- Profile Display
- User Login

Failed Transactions Tab

From the new Failed Transactions tab on the Web Transactions page, you can view and manage transactions that failed to download into batches. Transactions appear on the tab after a failed attempt to download them from the **Pending transactions** grid on the Transactions tab.



The **Failed transactions** grid displays transaction types, batch template names, dates when downloads failed, and users who created transactions. You can expand transactions to view the error messages and to:

- Delete them so the program no longer attempts to download them into batches
- Resubmit them for download

> ***Note:*** When you resubmit transactions, the program executes a new business process to download transactions.

- View the form data in XML format
- Edit the associated batch templates to add fields that are necessary to download them

This enhancement allows you to resolve issues with transaction downloads after you upgrade and use the new batch templates. For information about the new batch templates, see Blackbaud Internet Solutions Batches on page 47.

Service Pack New Features

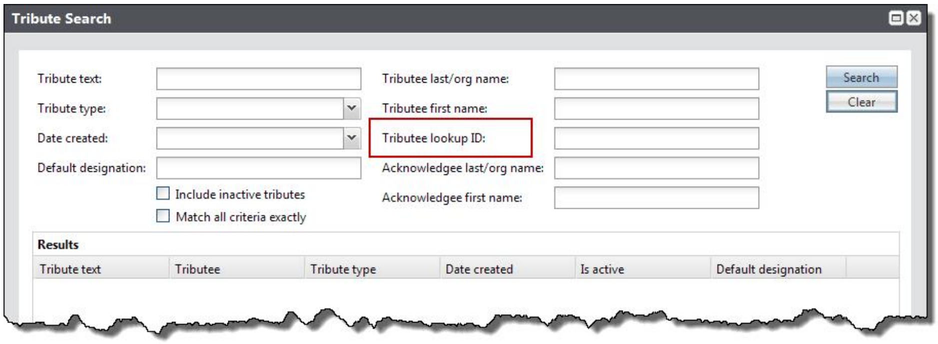
These features were introduced in Service Packs after the original ***CRM 3.0*** release.

Service Pack 1

Tribute Search

You can now search for a tribute using the tributee lookup ID. In the **Tributee lookup ID** field, enter the lookup ID of the constituent recognized by the tribute. You can enter the entire ID or only the first digits. For example, if you enter "1", all tribute lookup IDs that begin with the number 1 appear.

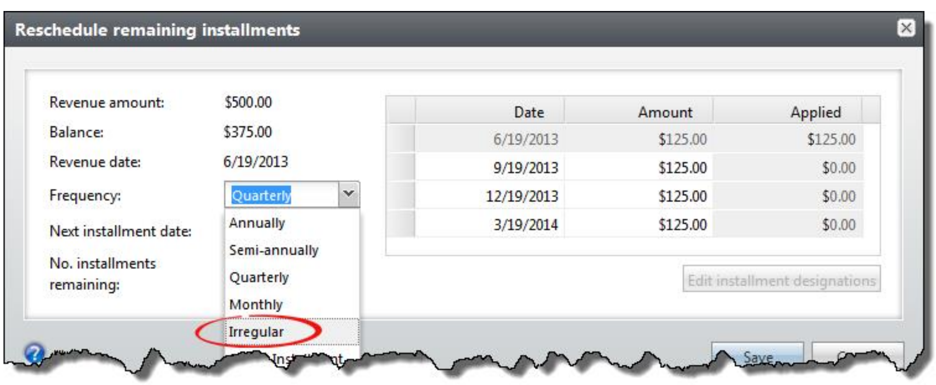
Prior to this release, you could search by constituent last name and constituent first name. This additional search option can help you quickly locate records. To access the Tribute Search screen, select **Search for a tribute** on the Tributes page in *Constituents*.



Irregular Schedules for Membership Installment Plans

For memberships paid with installment plans, we have added the ability to set irregular installment schedules, similar to irregular pledge installment schedules. You can set up the membership installment plan with an irregular installment schedule when you add the membership. But you can also set up the membership with a regular installment schedule, such as monthly, and then change the schedule to irregular later, if needed. This functionality gives you the flexibility to accommodate members in the case where a member may request to make a smaller payment one month.

To make an existing membership installment plan schedule irregular, from the constituent's membership record, click **Change installment plan schedule**. Or from the membership revenue transaction record, click **Edit membership installment plan** under **Tasks** or click **Reschedule installments** on the Installments/Write-off Activity tab. You can then select a frequency of “Irregular” and change the dates and amounts of the remaining installments. To add a membership with an irregular installment schedule, select a frequency of “Irregular” and enter the dates and amounts of the installments.



Service Pack 2

There are no new features in Service Pack 2.

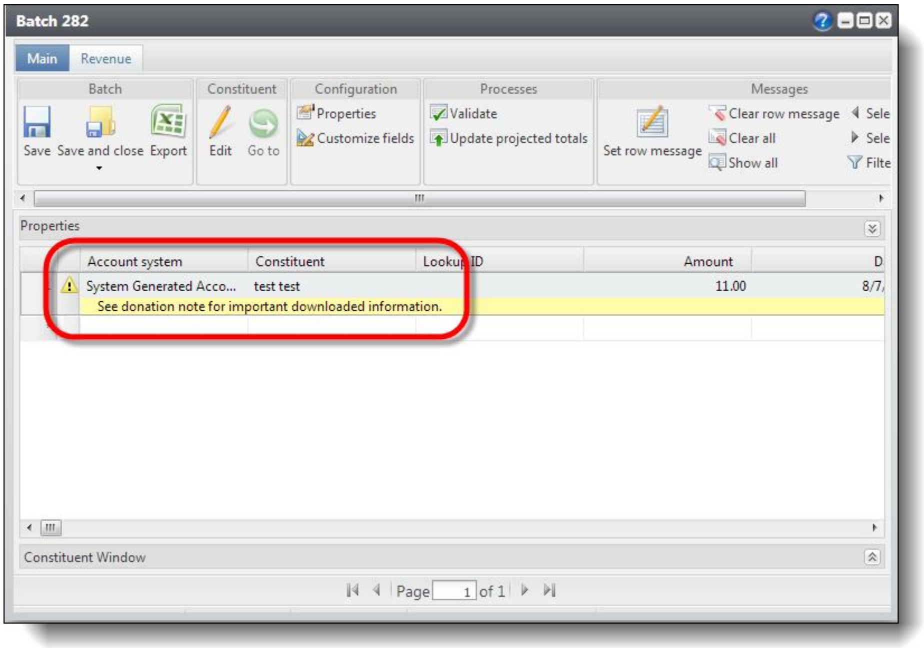
Service Pack 3

Enhanced Revenue Batch

Note: This change was released in ***Blackbaud Internet Solutions*** 3.0 patch 17.

Tribute acknowledgee, corporate, and matching gifts that you download from ***Blackbaud Internet Solutions*** no longer require you to review a batch message for a revenue note before you commit the Enhanced Revenue Batch. Now, the program uses a yellow caution symbol beside the batch row, along with the batch message, to alert you that the revenue note exists. You can view the revenue note or you can commit the batch successfully without clearing the batch message.

Tip: The batch messages remove from the screen when you save the batch.



Previously, tribute acknowledgee, corporate, and matching gifts created an exception on the batch row that prompted you to manually clear the batch message for the revenue note before you committed the batch. This slowed down batch processes.

Service Pack 4

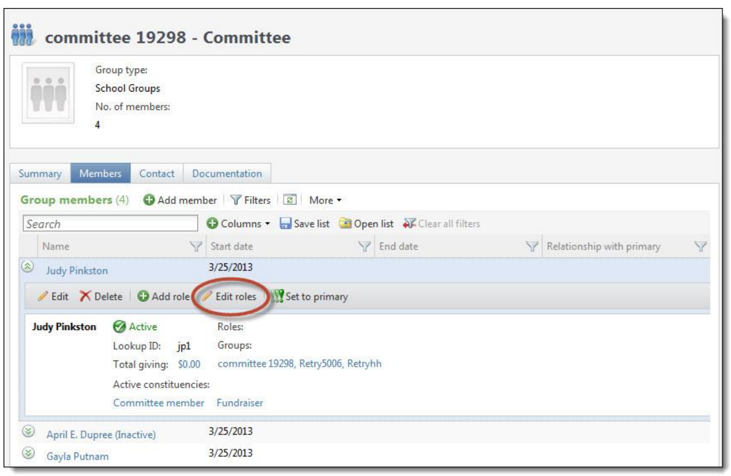
SEPA in CRM

The European banking industry, with the joint support of the European Commission and the European Central Bank, has implemented the Single Euro Payment Area (SEPA) to help streamline cross-border euro payments between SEPA countries. You must follow the SEPA standards if your organization has a bank account in the euro area which accepts direct debit transactions from constituents with other euro-area bank accounts. With this release, Blackbaud CRM provides the tools you need to process SEPA banking system transactions, including the ability to track information about SEPA mandates for constituents as well as a new direct debit transmission file format for SEPA banks.

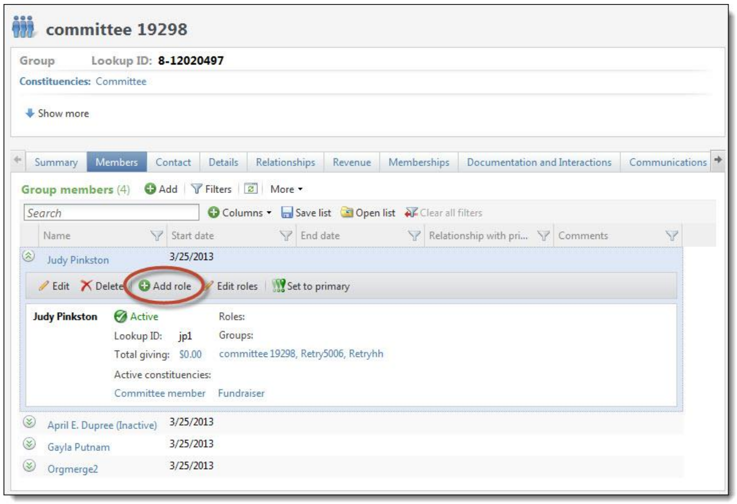
For more information, see SEPA and Blackbaud CRM.

Edit Committee Roles

You can now edit roles for a committee from the Committee page. On the Members tab, click **Edit roles** to edit existing roles for the committee. Previously, you could only edit roles from the Constituent page for the committee.



You can also now add roles from the Constituent page of a Committee. On the Members tab, click **Add role**.



To find a committee, from *Constituents*, click **Committee search**.

Export Encrypted Fields

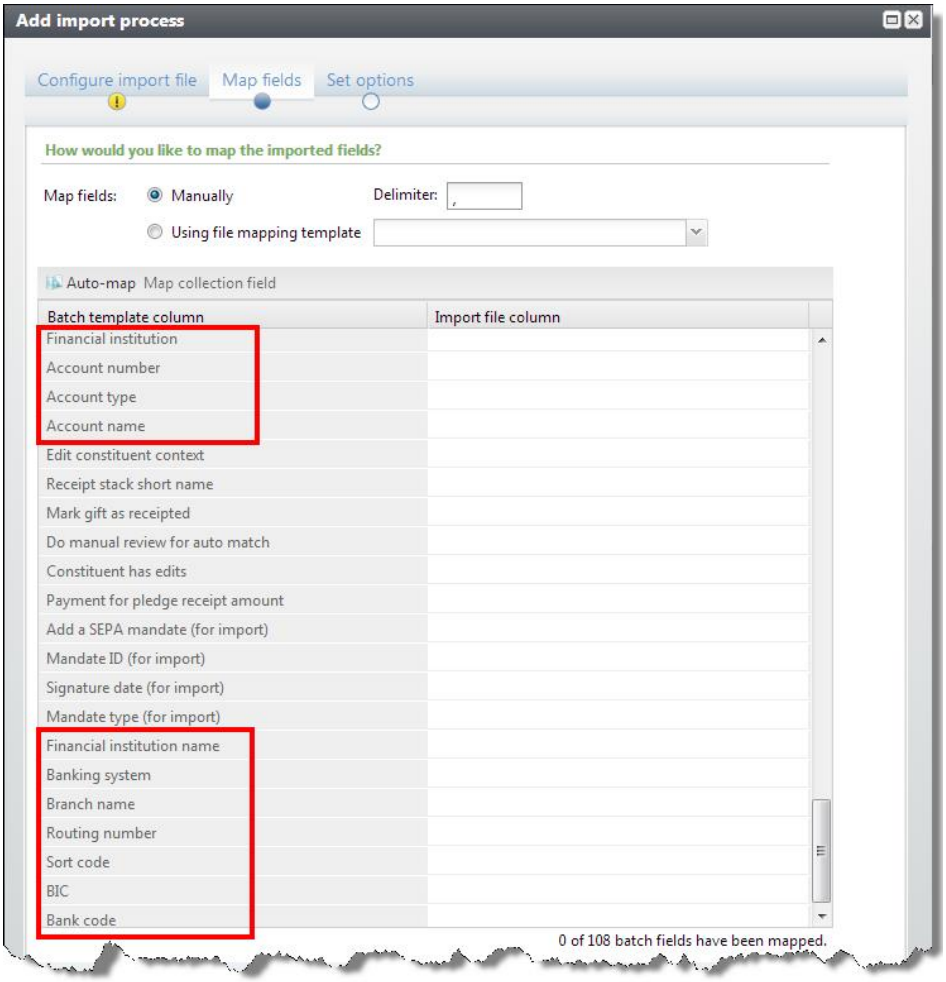
Previously, when you included encrypted fields, such as **Account number**, in an export, the fields appeared blank. Now, when you include these fields, the data appears on your export unencrypted.

Import Financial Account and Financial Institution Information

With this release you can now import additional financial account and financial institution information using *Batch*. New fields are available when you create financial imports using the Enhanced Revenue Batch.

For financial accounts, the following fields are now available: Financial institution, Account number, Account type, and Account name.

For financial institutions, the following fields are now available: Financial institution name, Banking system, Branch name, Routing number, BIC, Sort code, and Bank code. Note that when working with financial information, you must use the routing field associated with your selected banking system.

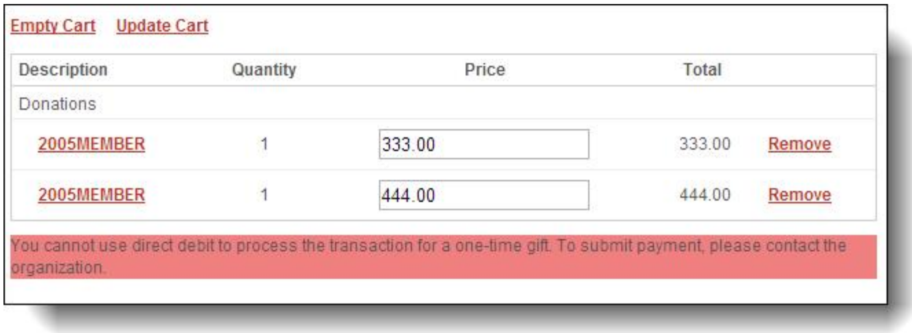


Payment 2.0

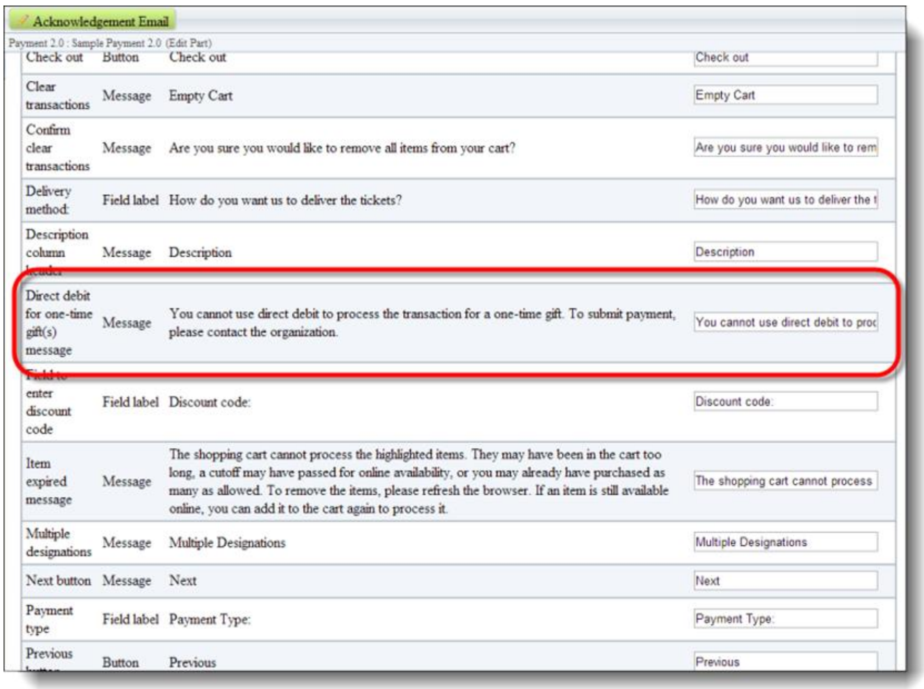
Direct debit payments can no longer be selected for one-time payment transactions in Blackbaud Internet Solutions. As a result, when a website user includes a one-time item in the shopping cart on a Payment 2.0 part, the direct debit payment option does not appear from the **Payment Type** field on the web page.

Note: For complete information about the impact of these changes, make sure you review the patch note details below by entering "310918" in the **Search** field.

When you configure a Donation Form part to integrate with a Payment 2.0 part, avoid selecting **Direct debit** as the only payment option for one-time gifts because this prevents website users from processing payment. If this configuration does exist on your page, a message appears to inform users they cannot submit payment.



You can enter the text you want to display for the message on the Payment 2.0 part's Language tab, under the Payment category, in the new **Direct debit for one-time gift(s) message** row.



Tip: As of Blackbaud CRM 3.0, patch 27, the web.config file for Blackbaud Internet Solutions includes the new appSetting "AllowDirectDebitForOneTimeGifts" so you can allow direct debits for one-time gift on custom processes. By default, the program continues to prevent direct debits for one-time gifts. This setting should only be used for your organization’s custom processes that allow direct debits for one-time gifts.

Membership Installment Plans and Payments

For more streamlined payment processing, you can now include membership installments in the Generate direct debit files process, the Credit card processing process, and the Generate payments process. Previously, these processes could include only pledges and recurring gifts. Now when you run these processes for membership installments, any memberships with outstanding installments which meet the criteria are included in a new Membership Dues Batch.

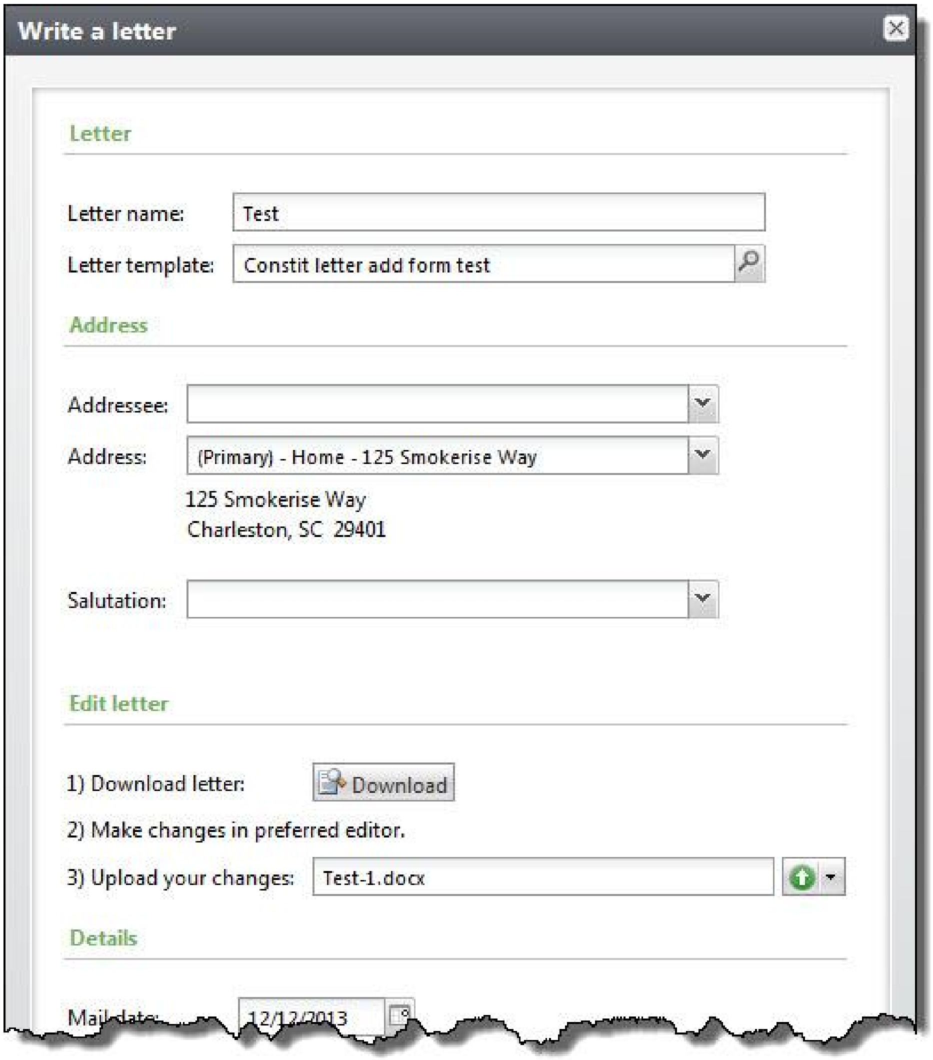
Note: When generating payments for membership installments, the only batch templates available are Membership Dues Batch templates which include the required fields: **Receipt amount**, **Account**, **Reference number**, **Reference date**, **Authorization code**, **Name on card**, **Card number**, **Card type**, and **Expires on**.

Service Pack 5

Edit a Letter to a Constituent

When you write a letter to a constituent, you can now edit the contents of the letter and save the updated version on the interaction.

From the Write a letter form, in the new Edit letter section, you can download the letter, make edits, and upload your changes. First, select a template in the **Letter template** field. Then, click **Download** to open the letter in *Microsoft Word*, where you can make your edits. Save the file locally, and then click the arrow to browse for and upload the file



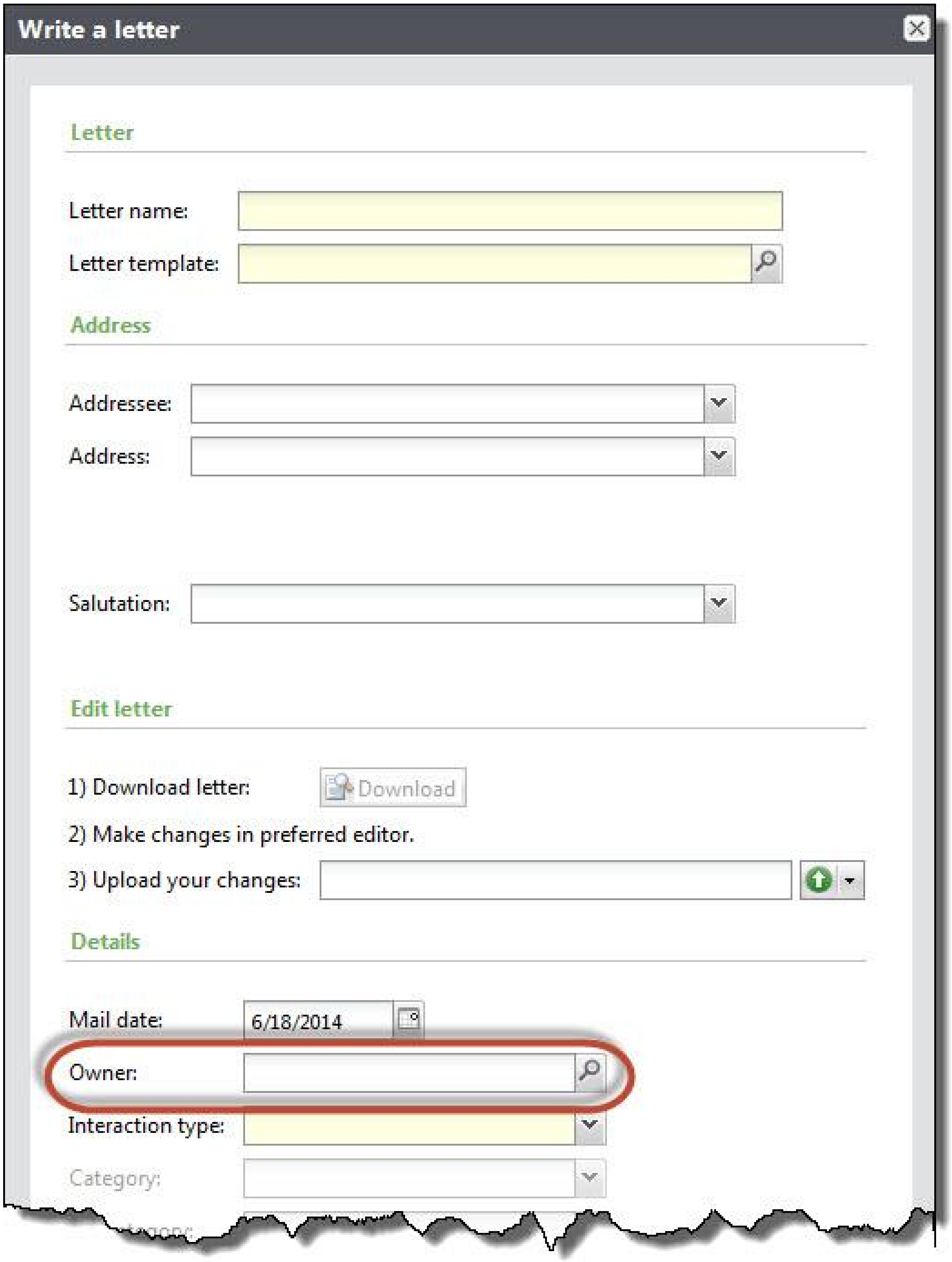
When you complete and save this form, you now navigate to the Documentation tab on the constituent interaction. Previously, you navigated to the Interactions tab on the constituent's record.

You can also edit and save the letter from the Documentation tab in the constituent interaction. To do this, expand the attachment and click **Edit**. On the Edit attachment screen, click **Download** to open the letter, make your edits, and then click the green arrow to upload the updated version. You can use this option to upload a letter you created outside the program.

To access the Write a letter screen, from a constituent record, click **Write a letter** under Tasks.

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**.



Blackbaud Secure Payment

Blackbaud Internet Solutions now includes 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.

The new endpoints include the following.

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

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.

Membership Installment Plans and Website Transactions

When someone purchases a lifetime membership with installments on your website, the membership transaction is now downloaded into CRM with the credit card payment token information. This allows future membership installments to be included in the CRM generate payments process and credit card processing process. Previously, the website user could purchase the membership and make the first installment payment on the website, but then had to be contacted by back-office staff about making the additional membership installment payments.

Service Pack 6

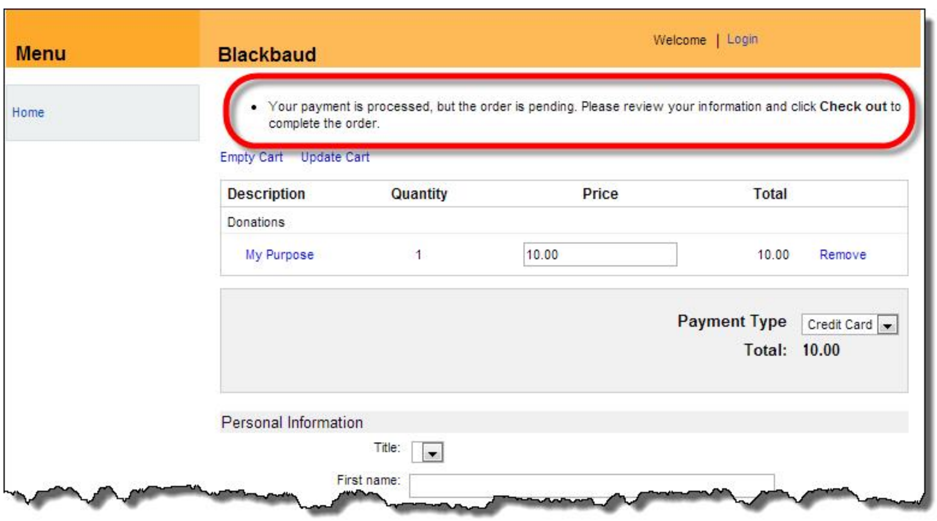
Donation Form

When a timeout occurs in Blackbaud Merchant Services or Blackbaud Payment Services, you can now enter the text to display to donors on your ***Blackbaud Internet Solutions*** website. You enter the text on the Donation Form part's Language tab, under the Validation Messages category in the new **Card processing timeout** row.

Note: The timeout message first appeared with the release of patch 26 to inform donors transactions are still processing so they do not attempt to resubmit them multiple times.

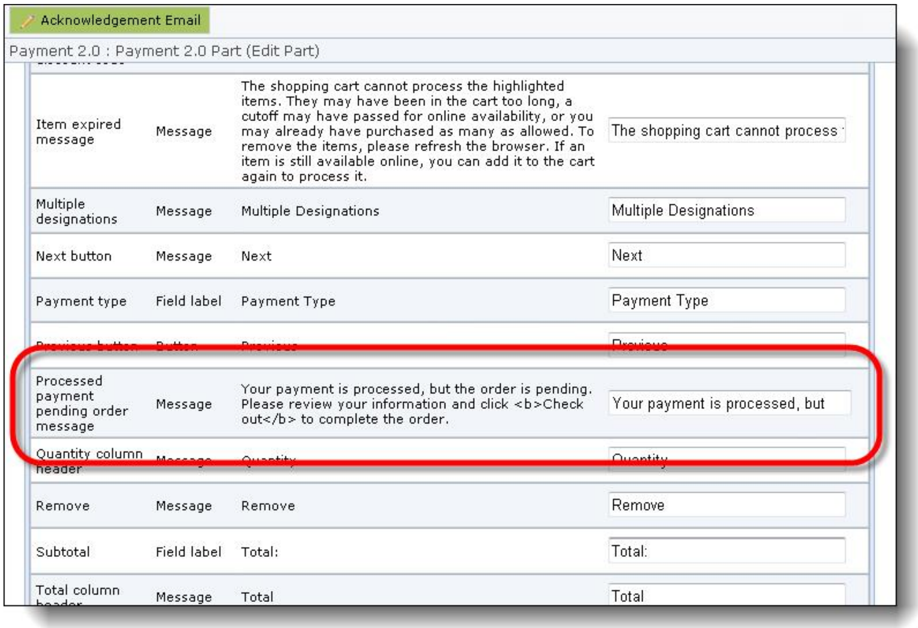
Payment 2.0

When a website user navigates from the Blackbaud secure payment page to the Payment 2.0 page on your Blackbaud Internet Solutions website, a new message now appears on the Payment 2.0 page when it is necessary to remind the user to click the **Check out** button. For example, this message displays when a user spends too long on the secure payment page and their session times out on your site. It also displays when the request to return to your site is handled by a different web server and the user's information no longer appears.



This helps make sure each credit card payment has a corresponding donation transaction to process in Blackbaud CRM, which does not occur when the user neglects to click **Check out**.

You can enter the text you want to display for the message on the Payment 2.0 part's Language tab, under the Payment category, in the new **Processed payment pending order message** row.



Service Pack 7

Directory

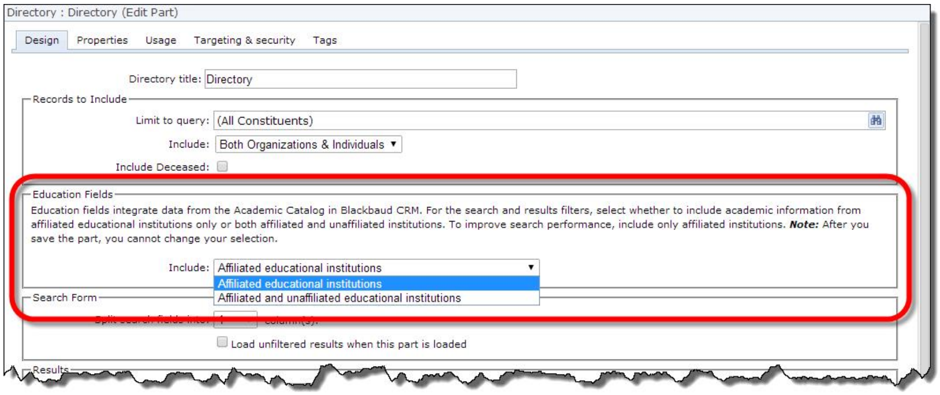
The Directory part now includes education and employment enhancements.

Tip: These enhancements also apply to the Member Search tab on a Chapter Manager part and to the Directory page element part type.

Education Fields

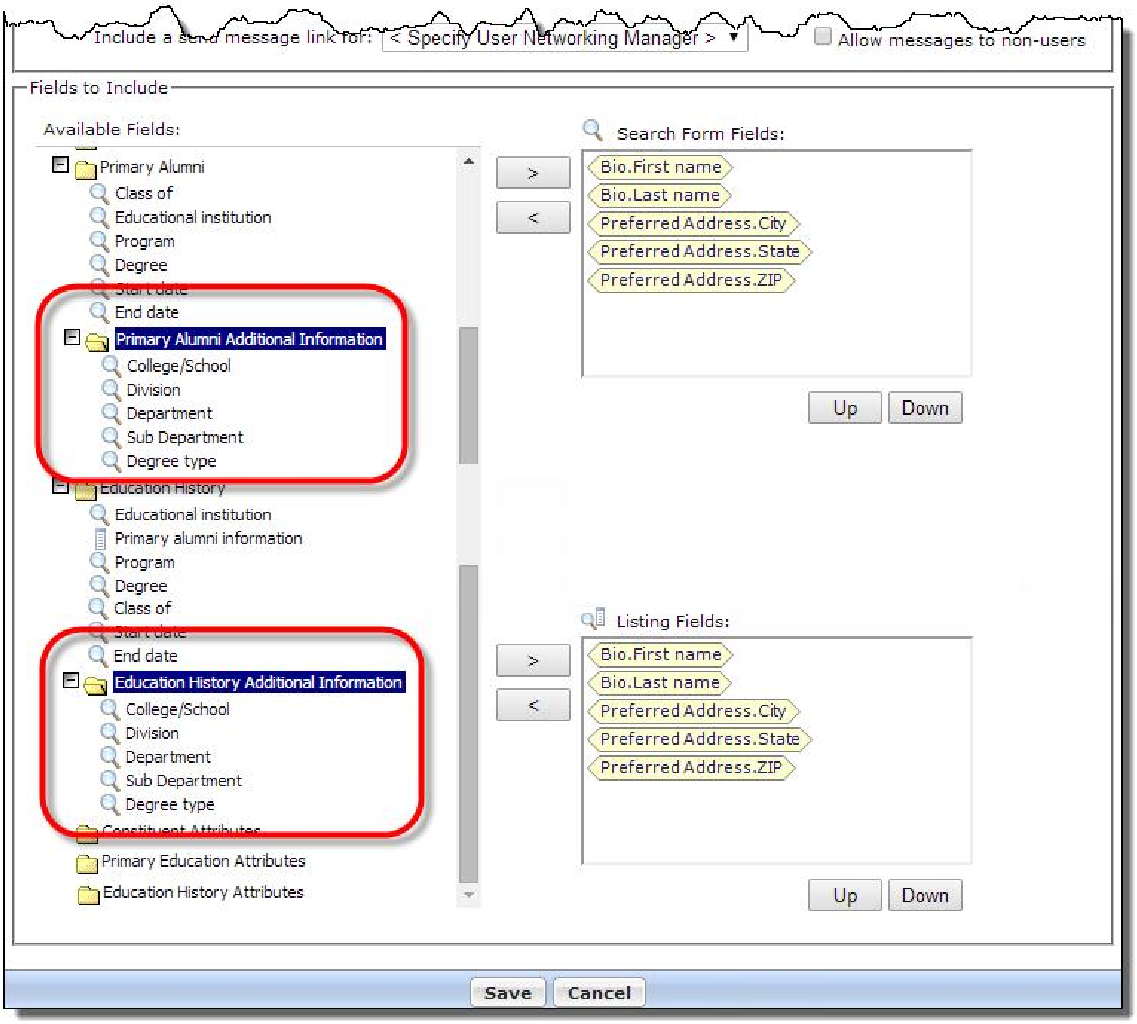
To provide additional education search fields and display more education information for website users in search results, you can now integrate data from the Academic Catalog in ***Blackbaud CRM*** with the Directory part in ***Blackbaud Internet Solutions***. For example, you can now use the **Department** field that integrates from the Academic Catalog on your website so alumni users can search and locate groups or individuals easily from your school's departments.

When you use the Academic Catalog and then create or edit a Directory part, a new **Education Fields** section displays. In this section, you select whether to include academic information from affiliated educational institutions only or both affiliated and unaffiliated institutions for the search and results filters.

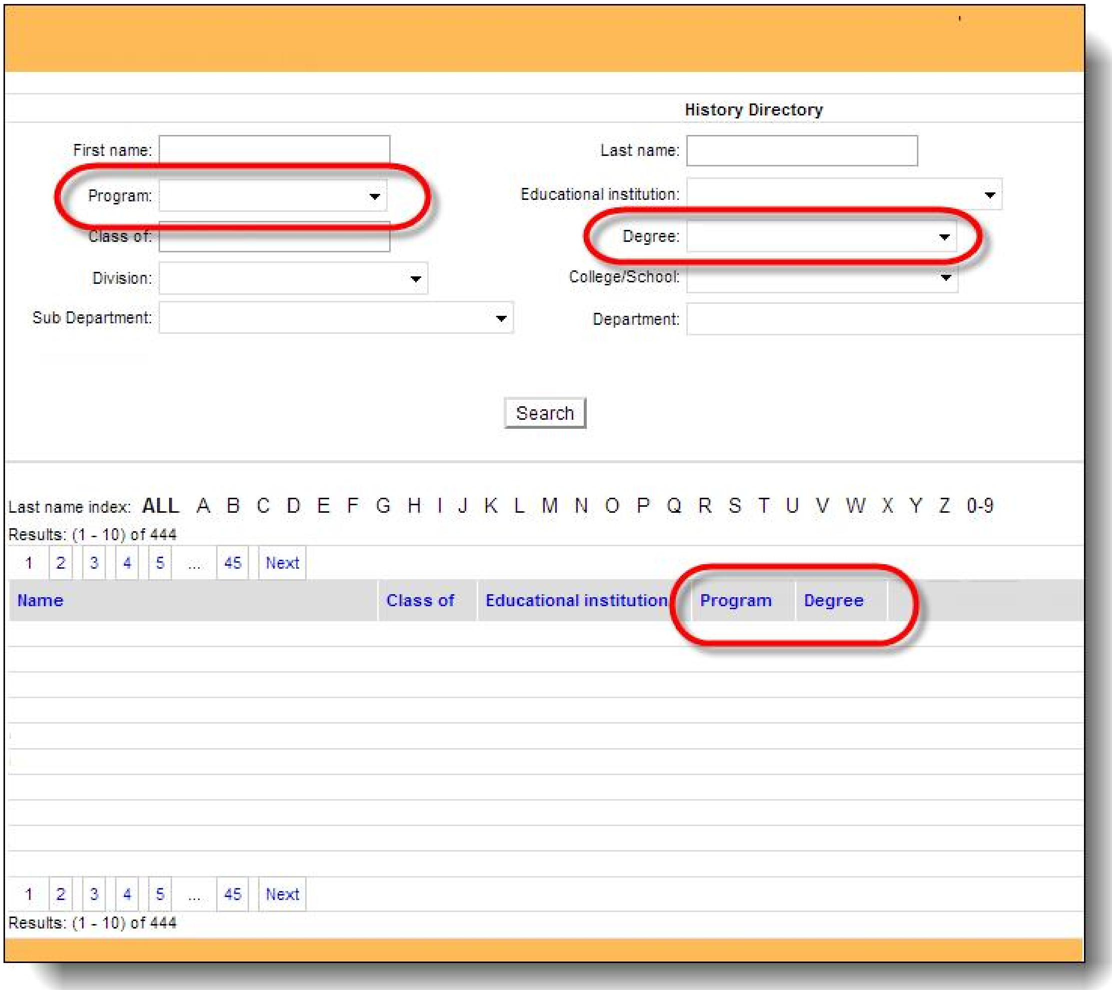


Tip: To improve search performance, narrow the volume of institutions to search by selecting "Affiliated educational institutions" in the **Include** field. After you save the part, you cannot change your selection in this field.

In addition to this section, more educational fields are now available to integrate Academic Catalog data with the Directory part on your website. Under **Available Fields**, in the **Primary Alumni** and **Education History** nodes, the **End date** field now appears in addition to the **College/School**, **Division**, **Department**, **Sub Department**, and **Degree type** fields that also appear in the new **Additional Information** nodes.



When you include these new fields under **Search Form Fields** and **Listing Fields**, website users can use them to search your directory and view the information in the directory display window for affiliated and unaffiliated institutions, depending on the selection you make in the new **Education Fields** section. For example if you include the **Department** field and select "Affiliated educational institutions" in the **Education Fields** section, users can narrow their search by selecting a department on the directory and then view the information in the search results for affiliated institutions only.



These part enhancements also include the ability to use the existing **Program**, **Degree**, and **Start date** fields under the **Primary Alumni** and **Education History** nodes to search and display this data for affiliated and unaffiliated institutions.

Important Considerations

- When you upgrade, the **Include** field in the **Education fields** section automatically defaults to "Affiliated educational institutions" for an existing directory that includes affiliated fields on a web page. When an existing directory does not include affiliated fields on a web page, "Affiliated and unaffiliated educational institutions" defaults in the field.
- The **Education fields** section only displays when you use the Academic Catalog in ***Blackbaud CRM***. The affiliated and unaffiliated educational institutions used for the search and results filters integrate from the Academic Catalog. For more information, refer to ***Blackbaud CRM*** *Administration Guide*.

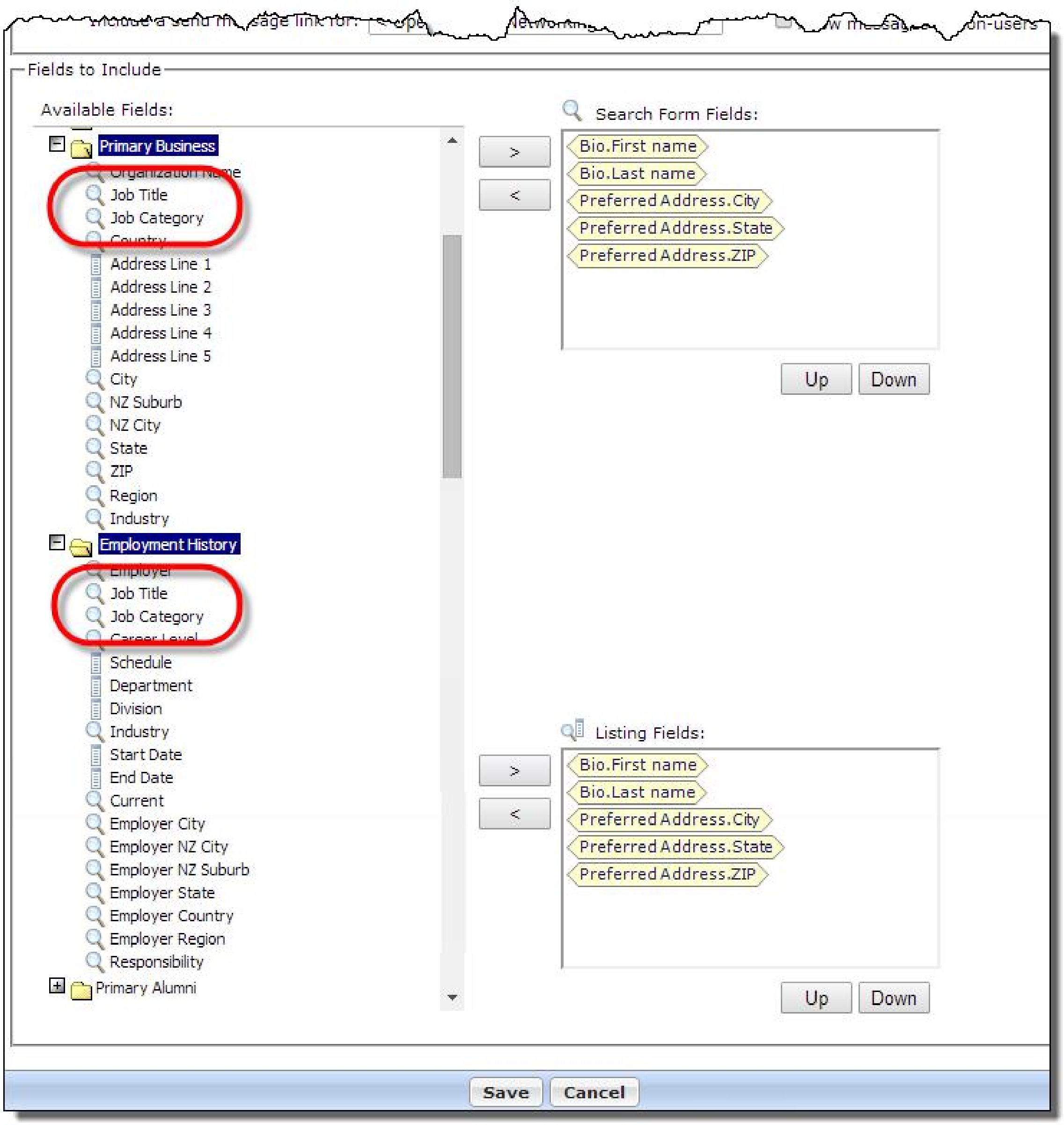
  Also, the new educational fields that appear under **Available Fields** in the **Primary Alumni Additional Information** and **Education History Additional Information** nodes only display when you use the Academic Catalog in ***Blackbaud CRM***. These fields integrate data from a constituent's record in ***Blackbaud CRM***. On the Education tab of a constituent's record, in the **Education** grid, the data appears under **Additional information**.

- The **Start date** and **End date** fields always appear on the Directory part; they do not depend on the Academic Catalog in ***Blackbaud CRM***. This data integrates from the **From** and **To** fields under **Dates attended** when you add or edit education information on the Education tab of a constituent's record in ***Blackbaud CRM***.

  On a directory web page, each field is limited to four numerical digits that require a 'yyyy' search. When you use the fields in the directory display window, the entire date, for example, 10/12/2015, appears.
- When you enable or disable the Academic Catalog in ***Blackbaud CRM*** and then add or remove Academic Catalog fields on the Directory part for the web page, the changes do not reflect on your website for approximately 20 minutes.
- To immediately display a new Academic Catalog field on the Directory part, click **Refresh code tables** in *Administration*, *Code tables* in ***Blackbaud Internet Solutions***.
- When you include these fields on a Profile Update form and a website user marks the information as private, the education fields remain private for the user when other website users search and view the information in the directory display window.

Employment Fields

To match field names in ***Blackbaud CRM***, the **Position** field has been renamed to the **Job title** field and the **Profession** field has been renamed to the **Job category** field under the **Primary Business** and **Employment History** nodes.



In addition, the Directory part has been improved to properly handle these fields when website users interact with the fields on your website. For example, users could previously use the **Position** and **Profession** fields to search employment history only. With this release, users can now use the **Job title** and **Job category** fields to search both primary (or current) employment and employment history. Also, the **Industry** field has been updated to search properly for both primary employment and employment history.

Search by Lookup ID

When you search for a constituent by lookup ID in the quick find field in the main navigation bar, you now see search results for records that match the lookup ID exactly. Previously, results also included records with lookup IDs that began with your search criteria, even if the lookup ID did not match your criteria exactly. For example, if you entered "123" as your search criteria, the search results would include a constituent record with a lookup ID of "123," as well as constituent records with lookup IDs that began with "123," such as "1234." Now, when you enter "123" as your search criteria, you only see results for records with a lookup ID of "123," but you would not see results for a record with a lookup ID of "1234."

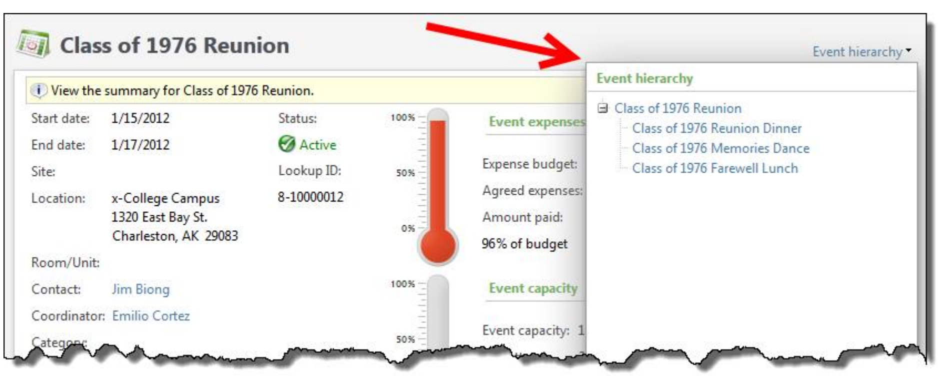
The search results still include records with a name that begins with or matches your search criteria. In the example above, the search results would still include a record with a name of "123 Organization," for example.

To search for a constituent on the quick find field, select "Constituents" in the drop-down and enter your search criteria.

Note: This change is a follow-up to a feature introduced in version 3.0. In that version, the quick find field in the main navigation bar first allowed you to search by constituent lookup ID and the Constituent Search screen was replaced by the Constituent Search by Name or Lookup ID screen. If you have customizations affecting the Constituent Search screen and have not done so already, you should determine if your customizations need to be updated. If you built a customization for the previous Constituent Search screen, your customizations may have been impacted by those changes and should be tested to determine if your customization needs to be updated. If you had changed the output fields or filter fields for the Constituent Search screen, you must edit the settings for the Constituent Search by Name of Lookup ID screen in order for those changes to appear in the new screen. If you used the search list replacement functionality to replace the Constituent Search screen with a different search screen, you should consider updating the new Constituent Search by Name or Lookup ID screen with the other screen. To do this, from *Administration*, click **Search list configuration**.

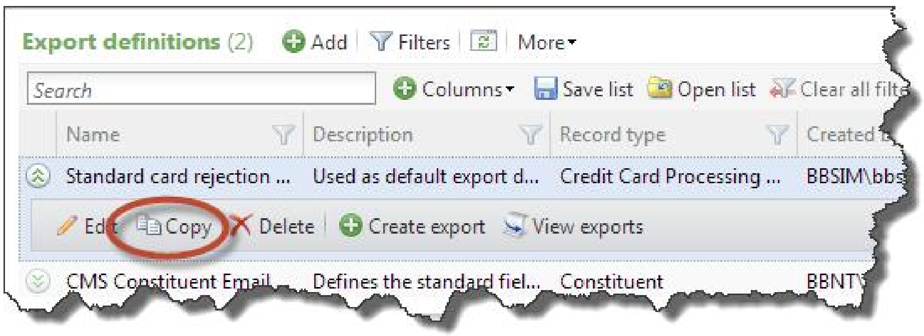
Multi-level Event Hierarchy

When an event is part of a multi-level event hierarchy, you can view the event hierarchy from the individual events in the WebUI version of the program. From a multi-level event, click **Event hierarchy** on the right edge of the page. The Event hierarchy view appears. You can use this view to move quickly between events in the hierarchy. Previously, you could do this in the ClickOnce version of the program.



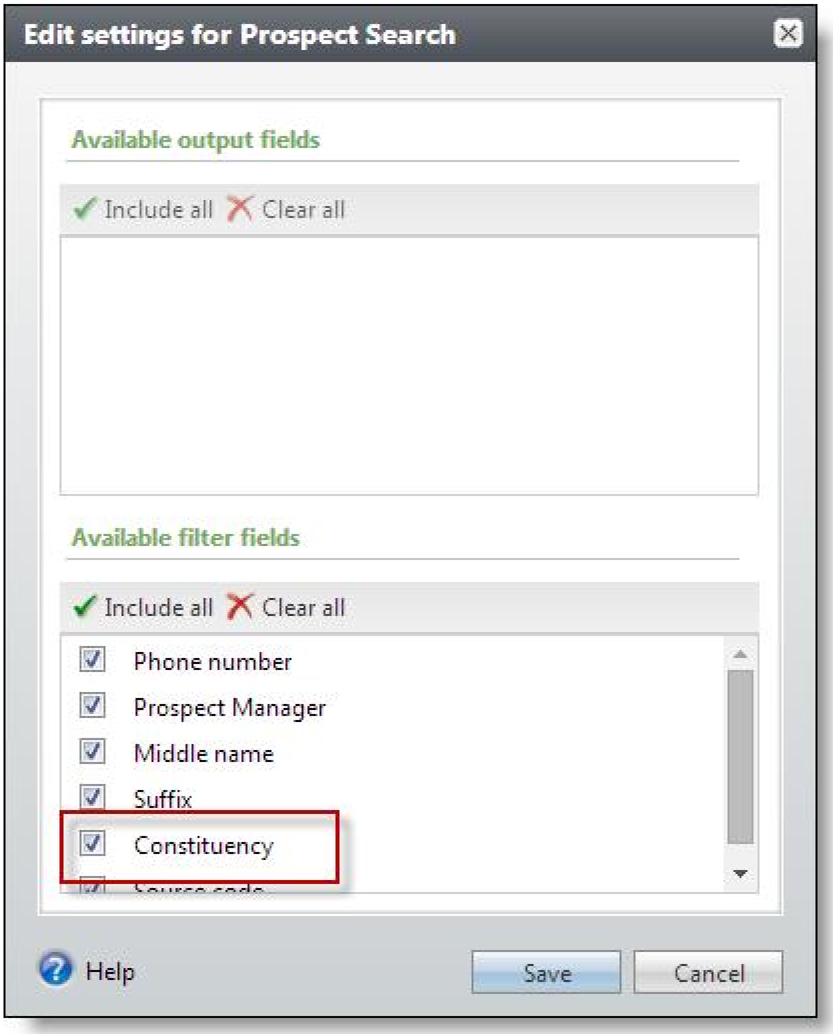
Copy Option for Export Definitions

A new **Copy** option is available for export definitions in the webshell version of Blackbaud CRM. On the Export definitions page, click the double arrows beside the export definition to expand the row. From the action bar, click **Copy**. After you confirm the selection, a copy of the export definition appears in the list. This change allows you to copy existing definitions so you can use them as templates for new definitions. Previously, you recreated definitions when you needed new versions of them. This enhancement reduces the number of steps to update existing definitions so you can work more efficiently.



Constituency Field for Prospect Search

When searching for major giving prospects, you can now use the **Constituency** field on the Prospect Search screen to filter by constituency. In ***CRM 2.91*** and earlier, the **Constituency** field was available on the Prospect Search screen, but was removed after version ***CRM 2.91***.



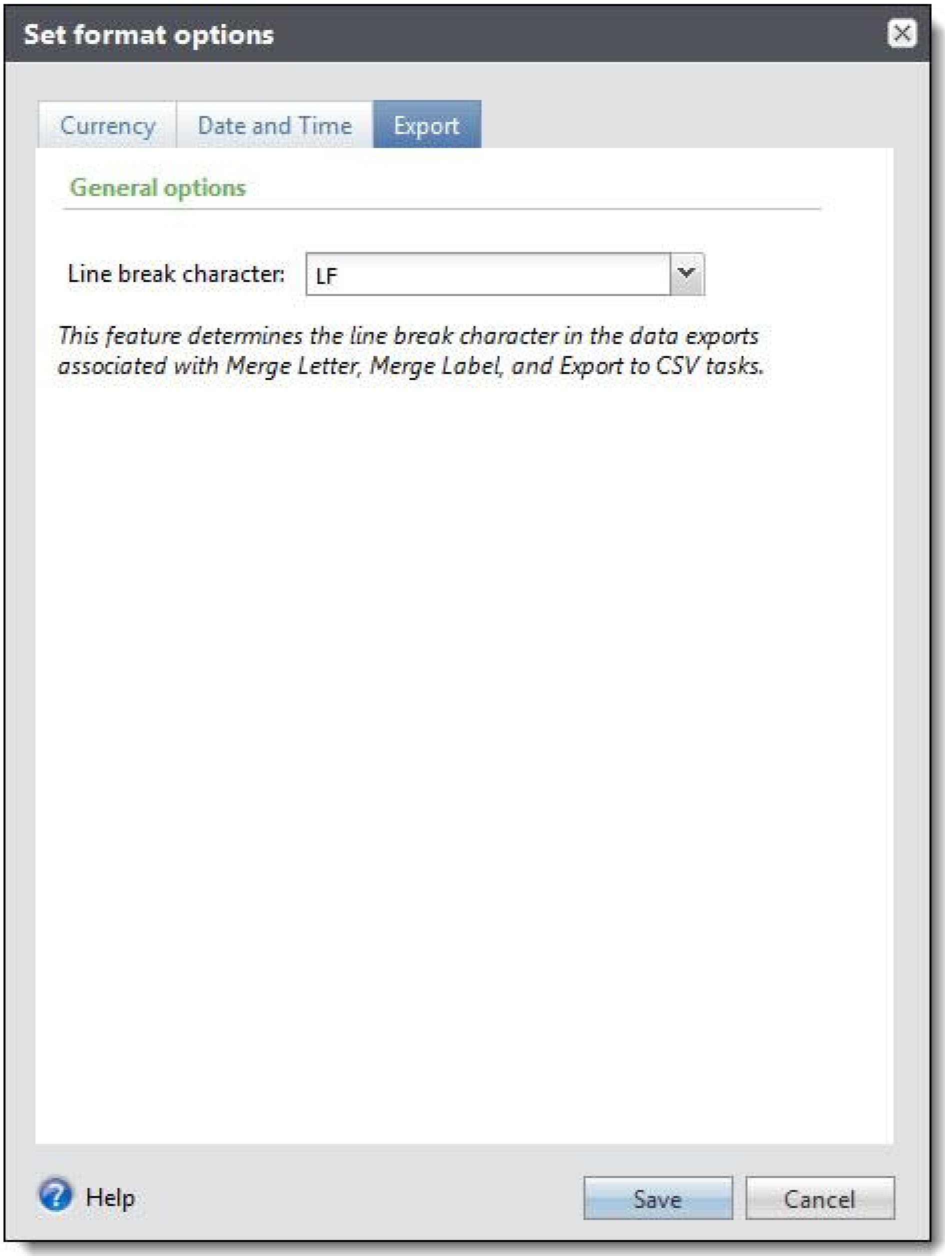
Service Pack 8

There are no new features in Service Pack 8.

Service Pack 9

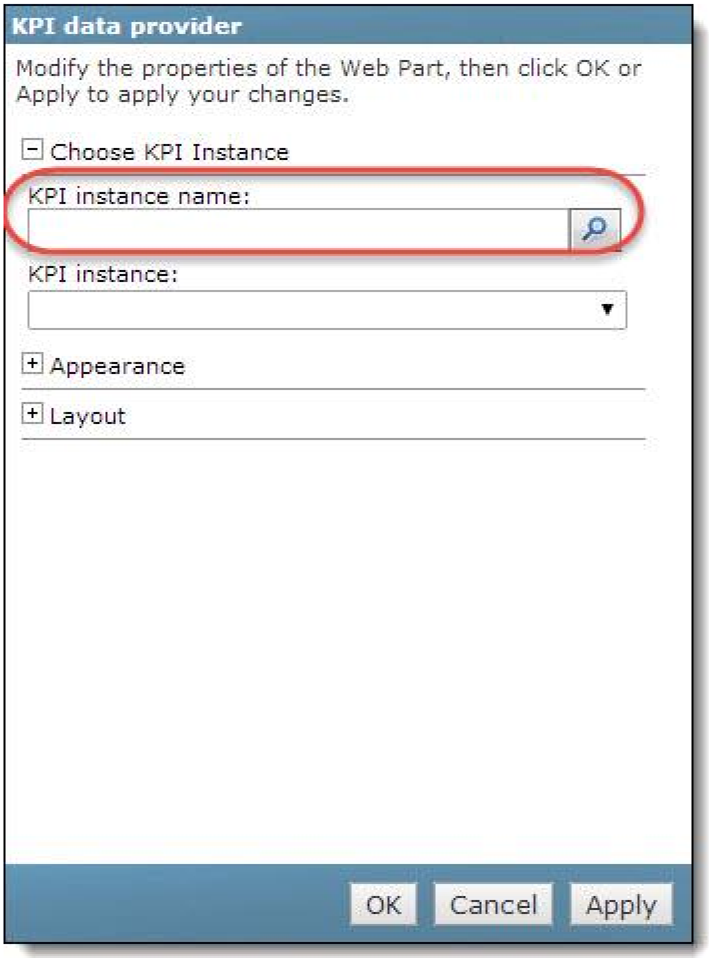
Line Break Options for Business Processes

When you run a business process that outputs data, such as an export or reminder, you can now set up line spacing options. From the business process, click **Set format options**. The new Export tab allows you to select the line break option for the output. This determines how the output separates lines and can be helpful if the default format does not work for your needs. If you have problems when you use the output with a third-party program such as *Microsoft Word*, change the selected option on the **Line break character** field and run the process again. Different software programs may expect line break options to follow line feed breaks (LF), carriage return breaks (CR), or both (CR+LF). If you do not know what format your software program requires, you might need to test by trying each option. The **Line break character** field defaults to the line feed (LF) option.



Select KPI Instance on Web Dashboard

When you add a Data Provider KPI part to a web dashboard, you can now filter KPIs by name using the new **KPI instance name** field.



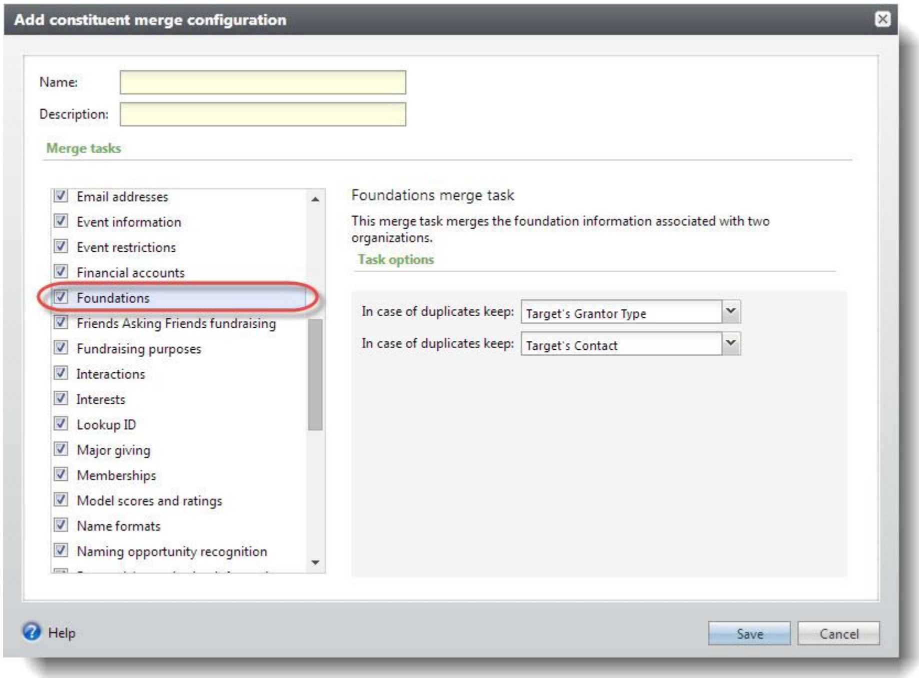
Previously, you only saw a list of 500 KPIs and could not select additional KPIs, so if you had more than 500 KPIs, you could not always see the one you were looking for.

Merge Grantor Organizations

You can now merge granting organizations. Previously, you were not able to merge two organizations that gave grant awards.

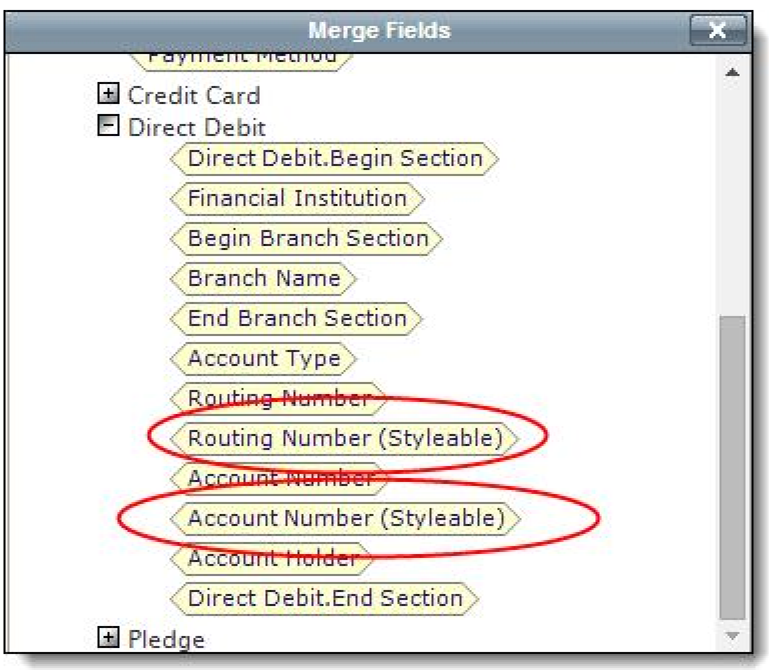
To configure merges for foundations, from *Constituents*, click **Duplicates** and select **Constituent Merge**. On the Merge Configurations tab, click **Add**. The Add constituent merge configuration screen now includes Foundations.

Note: The Foundations merge task will be enabled by default for all pre-existing merge configurations.



Payment 2.0: Merge Fields

New styleable Routing Number and Account Number merge fields are available in Blackbaud Internet Solutions when you configure confirmation screens for Payment 2.0 parts that accept direct debit transactions.



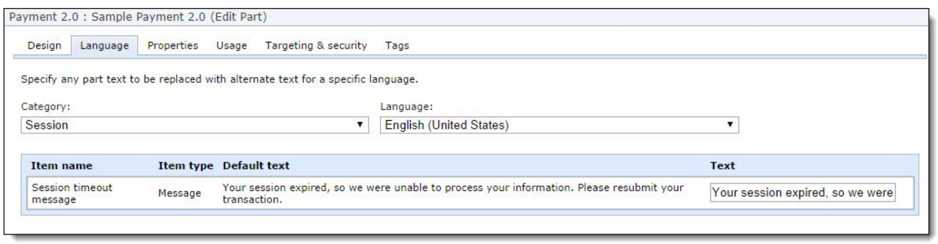
Also, new style sheet classes are available for the fields when you use the program's *Style sheet* section to add part styles. The new fields enable website users in the United Kingdom to view the fields in a format that is compliant with the BACS payment system.

```
.PaymentPart_ConfirmationAccountNumberStyleable
{
}

.PaymentPart_ConfirmationRoutingNumberStyleable
{
}
```

Payment 2.0: Language Tab

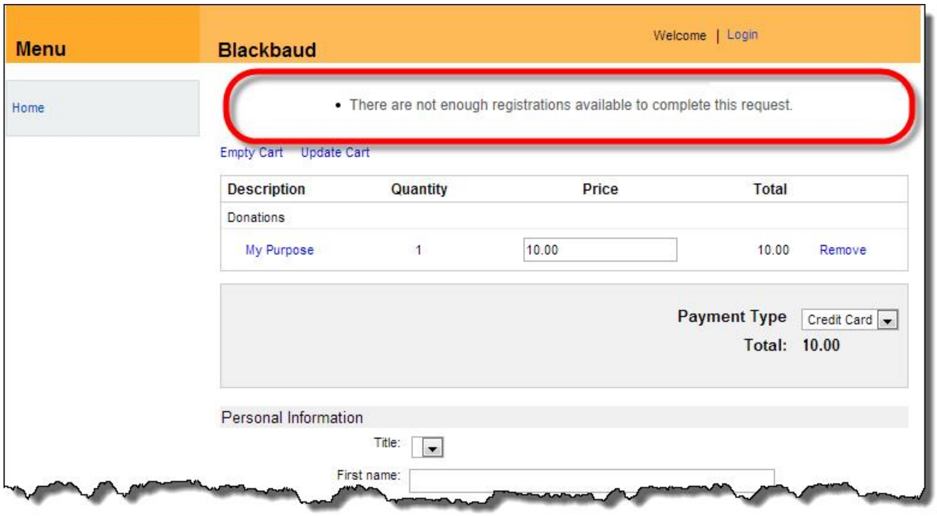
You can now specify the text to appear when a ***Blackbaud Internet Solutions*** website user's session times out on the direct debit screen of a transaction. You enter the text on the Payment 2.0 part's Language tab, under the Session category in the new **Session timeout message** row.



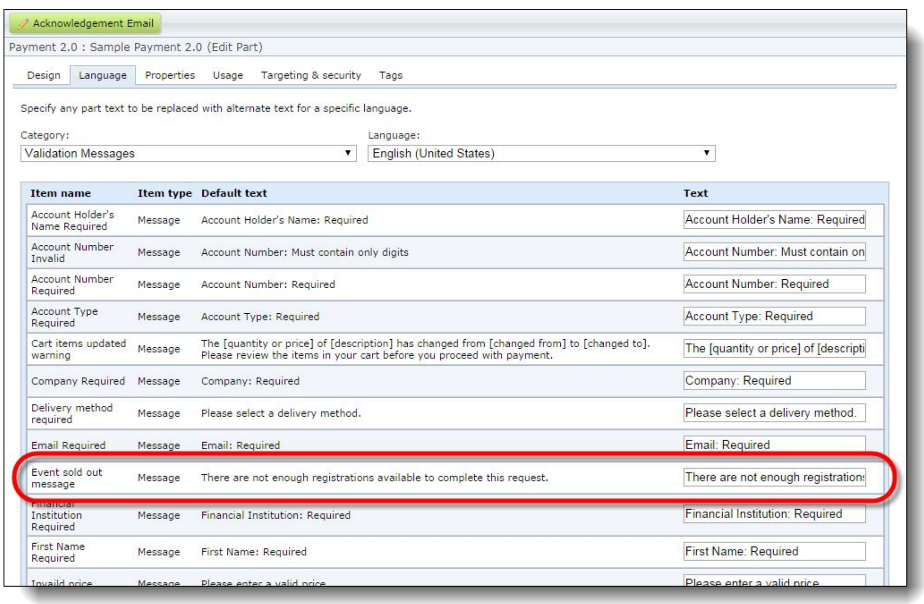
Previously, a message did not appear and the program created blank batches for transactions with expired sessions.

Also, when you integrate the Payment 2.0 part with an Event Registration Form part to provide shopping cart functionality for registration tickets, ***Blackbaud Internet Solutions*** now identifies whether the event capacity has been met before allowing a website user to submit the transaction. When event capacity has been met, a message now appears to inform the user that the transaction cannot be submitted.

Note: This change was released in ***Blackbaud Internet Solutions*** 3.0 patch 55.



You can customize the text to appear for the message on the Language tab for the Payment 2.0 part. Under the Validation Messages category, the new **Event sold out message** row appears. In the **Text** field, you can enter custom text to appear or you can use the "There are not enough registrations available to complete this request" default message.



Note: When a user attempts to submit a transaction for a higher number of tickets than available, the program rejects the transaction. For example, if the user attempts to submit the transaction for two tickets and only one is available, the message appears and the transaction cannot be submitted.

Payment 2.0: Transaction Processing Safeguards

Note: This change was released in ***Blackbaud Internet Solutions*** 3.0 patch 55.

This enhancement enables ***Blackbaud Internet Solutions*** to transmit data to ***Blackbaud CRM*** when users navigate from your ***Blackbaud Internet Solutions*** Payment 2.0 web page to the secure payment page and an interruption unexpectedly occurs before the transaction is submitted. Previously, when an interruption occurred, the payment processor received the payment but the information from the Payment 2.0 web page was not sent to ***Blackbaud CRM***. Also, when the Confirmation page appeared, users were prompted to re-enter biographical information. This occurred because the data from the Payment 2.0 web page was stored in a browser session which could not process the transaction to ***Blackbaud CRM*** after the interruption.

Tip: An interruption can occur when your ***Blackbaud Internet Solutions*** website server refreshes while a user attempts to submit a transaction. An interruption can also occur when a user leaves your secure payment page for a time that exceeds the session login and then returns to the page and submits the transaction.

Now data from the transaction is temporarily stored in a new CMS_SessionVariableBackup database table so ***Blackbaud Internet Solutions*** can send the information to ***Blackbaud CRM*** regardless of whether an interruption occurs. Data that is temporarily stored in the table includes the following.

- Biographical data on the Payment 2.0 web page
- Merchant account information on the secure payment page. For PCI DSS compliance, this excludes credit card information.
- Shopping cart ID
- Cart item IDs
- Finder number when you integrate with ***Blackbaud Direct Marketing***

To support this enhancement, a new database process checks the table for data every 24 hours. After ***Blackbaud Internet Solutions*** submits the data to ***Blackbaud CRM***, it no longer exists in the table. The remaining data stays in the table for 30 days unless your system administrator changes the new UnprocessedBBSPTransactionLifeSpanInDays web.config setting to increase or decrease the number of days. For example, to increase the number of days to 60, enter <UnprocessedBBSPTransactionLifeSpanInDays = 60> in the <appSettings> node of web.config.

Note: The remaining data in the table likely exists because users entered payment information on the secure payment page, but did not submit the transactions. Your system administrator can access the table to provide you with a list of these users so you can follow up with them.

Your system administrator can also use the new ArchiveUnprocessedBBSPTransactions web.config setting to specify whether the process should move the remaining data from the table to a new CMS_ UnprocessedBBSPTransaction archive table in the database, or to delete it permanently. For example, to move the data to the archive table, enter ArchiveUnprocessedBBSPTransactions=True in the <appSetting> node of web.config. Otherwise enter False.

Service Pack 10

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***.

Service Pack 11

New Record State Column for Real Estate Assets

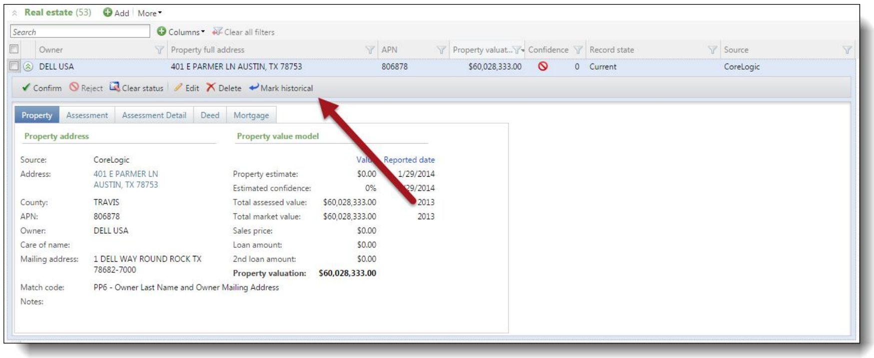
Note: This change was released in ***Blackbaud CRM*** 3.0 patch 61.

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."

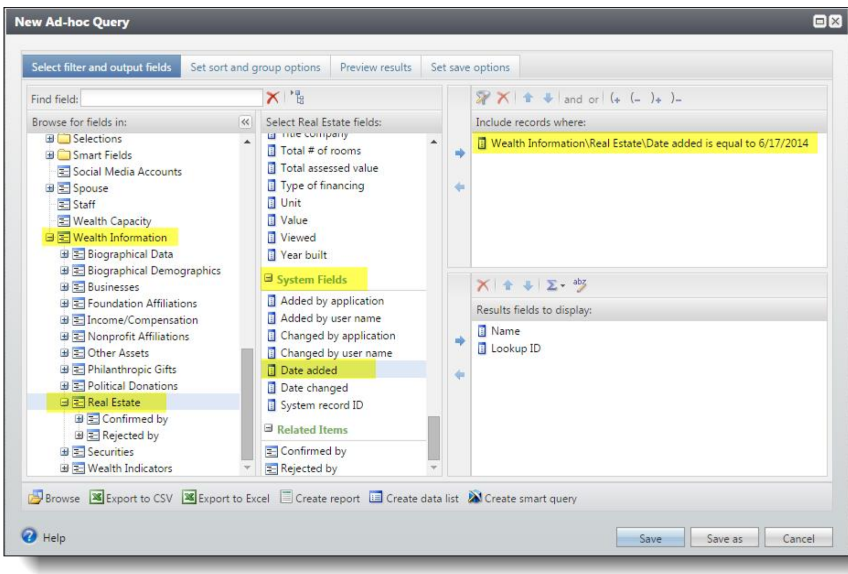
APN (assessor parcel number) is a unique identifier for real estate. However, APNs can change and without a consistent pattern because individual counties determine how to format their APN. For example, an APN county identifier changed from 01261801440000 to 123119. The issue does not affect new prospect 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.



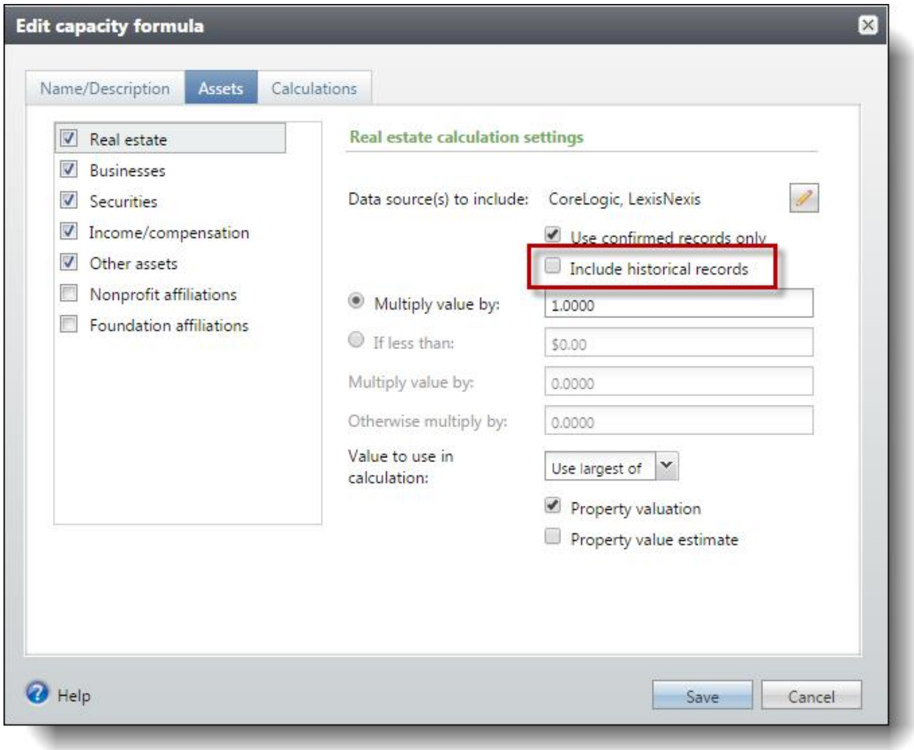
If you have not re-screened people for a long period of time leading up to the 4.0 update, you only need to query on the dates since you re-screened. For example, if you annually re-screen people during August, your query only needs to search for real estate added since 08/01/2014.

- 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.

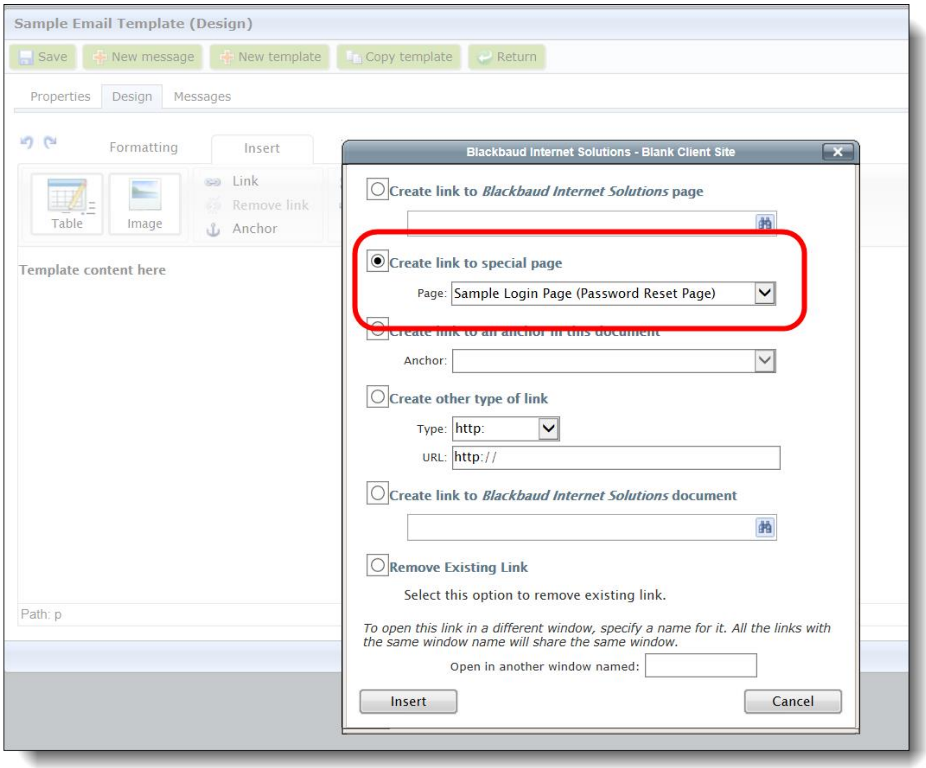
To assist with the accuracy of real estate values, we also updated the capacity formulas . By default, **Include historical records** is not selected as part of the real estate calculation settings. You can select the option to include if it is important to one of your capacity formulas.



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.

Password Reset Page Link

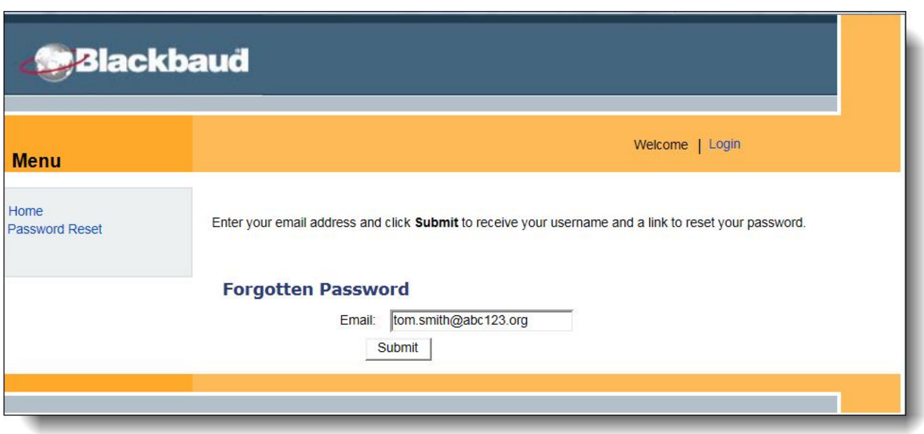
To improve password reset security in email messages from ***Blackbaud Internet Solutions***, you now select a user login password reset page from the **Create link to a special page** option on the HTML Editor when you design the email message.



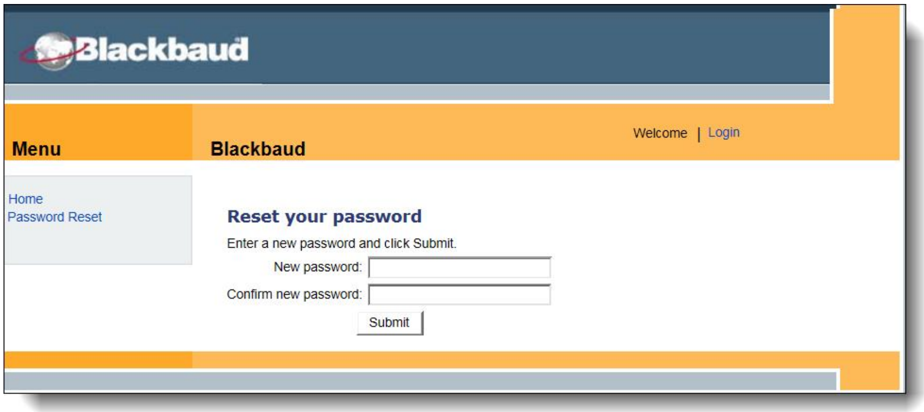
Tip: The ability to create a special page to link to your user login page (that you define for **Page** settings in *Sites & settings*) previously existed. With this feature, any page that contains a User Login part now appears from the drop down and you want to select the user login page that navigates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

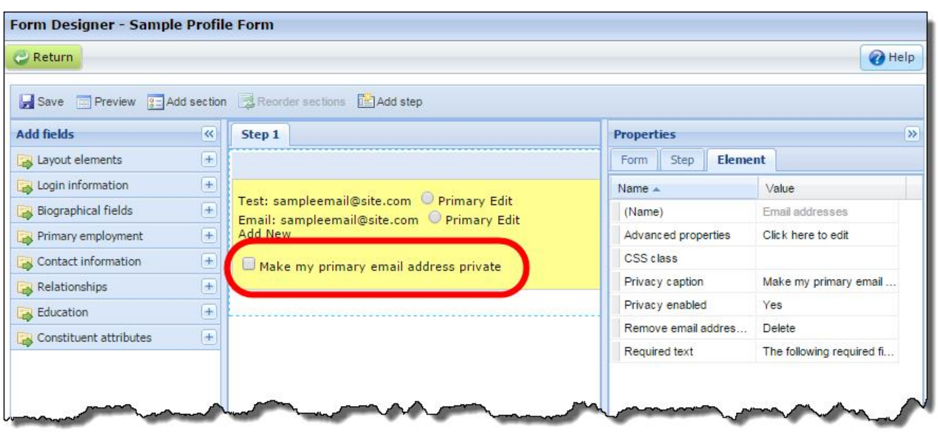


Previously, the **Password** merge field was available in email messages that use a Registered Users data source. With this update, this merge field no longer includes the password in an email. When a recipient receives the message, the placeholder for the field is blank. As a result, make sure you remove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

Service Pack 12

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.

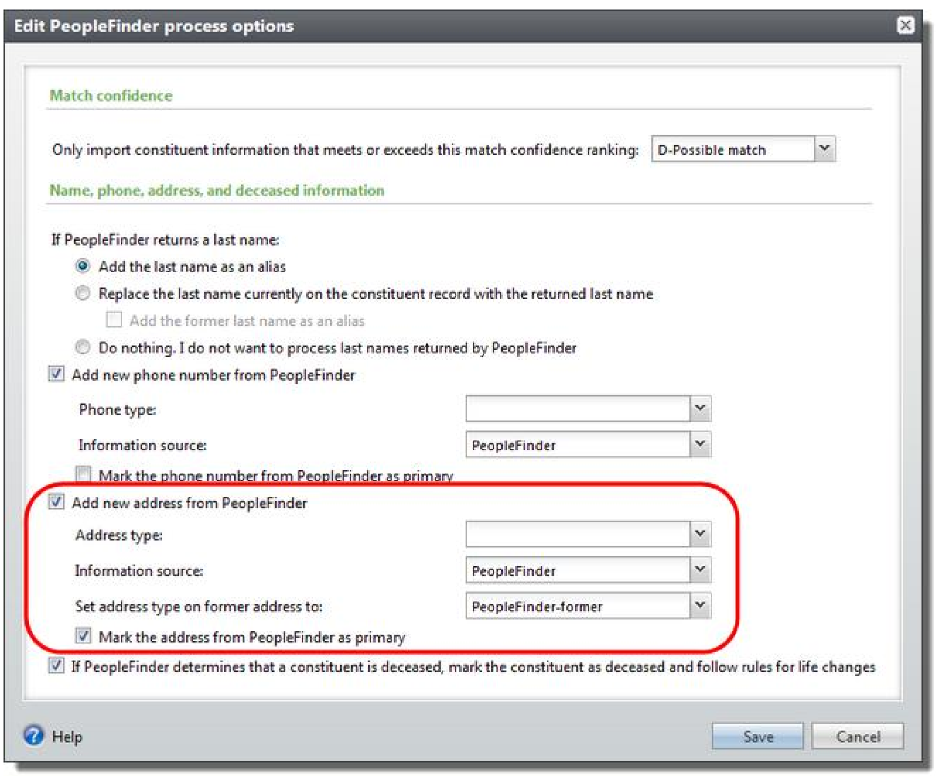
Note: When users select the new **Make my primary email address private** checkbox on your web page, it also designates their primary email address as private for the Directory and Profile Display parts on a web page.

Service Pack 13

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.



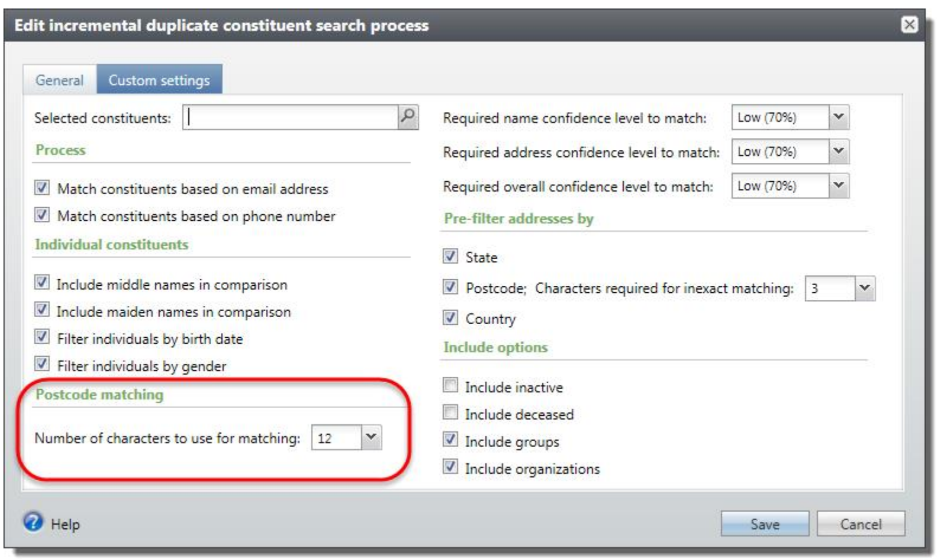
In order to support these changes, the PEOPLEFINDER process table in the ***CRM*** database has been updated with these additional columns: UPDATEADDRESS, OLDADDRESSTYPECODEID, NEWADDRESSTYPECODEID, NEWADDRESSINFOSOURCECODEID, and MARKADDRESSASPRIMARY. Existing *PeopleFinder* processes will remain unchanged; 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.

Service Pack 14

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.

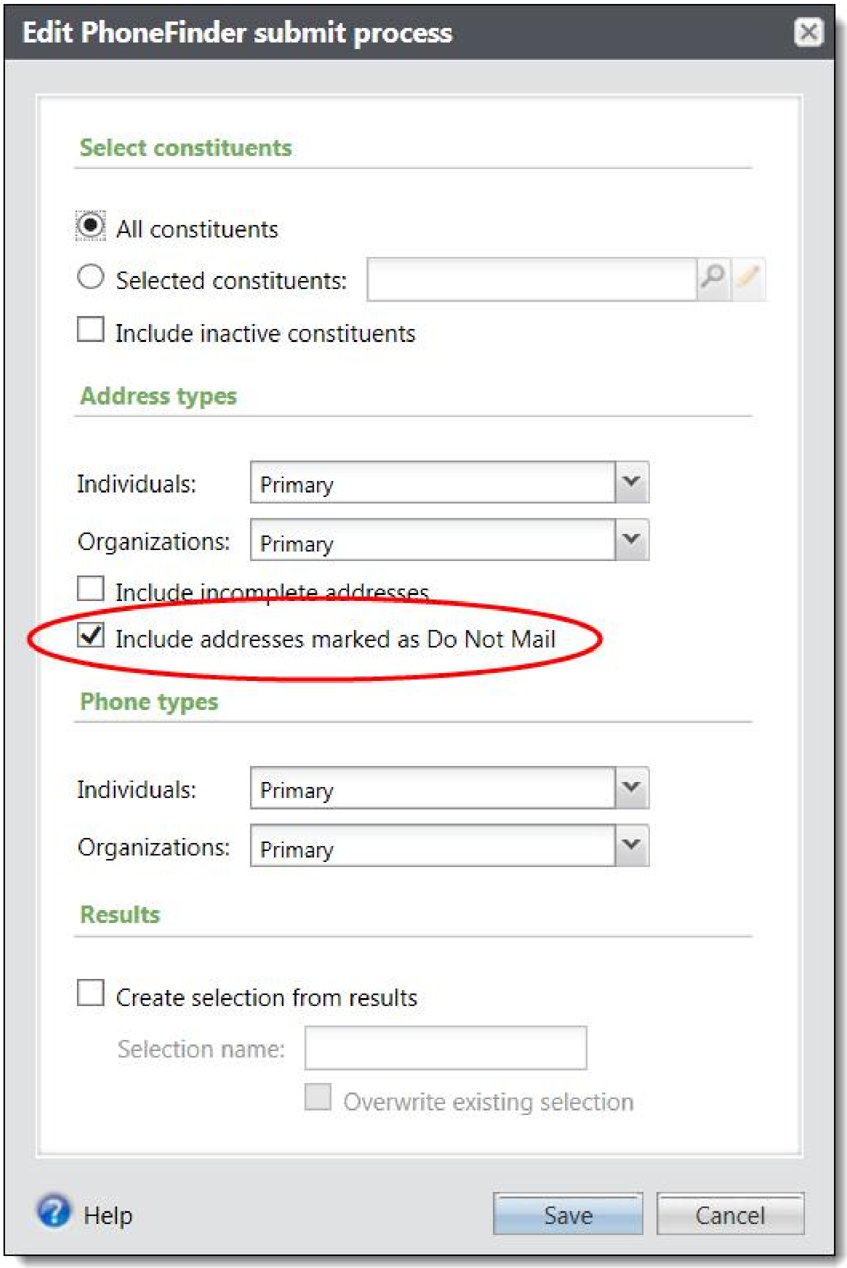
To correct this issue, we added a new field to the "Custom settings" tab of the "Edit incremental duplicate constituent search process" screen. The **Number of characters to use for matching** field allows you to specify how many characters of the postal code to compare for the match criteria. The default 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.



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.

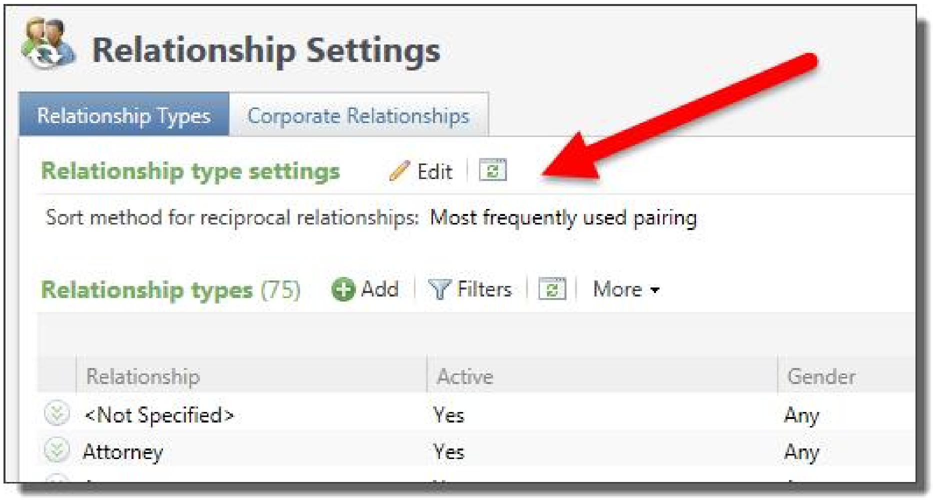
By default, this checkbox is marked to match existing behavior. In order to omit these addresses from the PhoneFinder process, you must edit existing PhoneFinder submit processes and unmark the **Include addresses marked as Do Not Mail** checkbox.



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.