

Administration Guide

12/22/2016 Blackbaud Internet Solutions 4.0 Administration US

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In *Administration*, you manage settings for your website. For example, in *Merchant accounts*, you add merchant account information to allow parts to process payments. And in *Field options*, you set privacy settings for profile information. We recommend that only website administrators or those with Supervisor rights access *Administration*.

Sites & Settings

In *Sites & settings*, you select whether to host multiple websites. You also select the global organization tasks and settings that apply to all your websites. And you select site-specific tasks and settings for each website that you host.

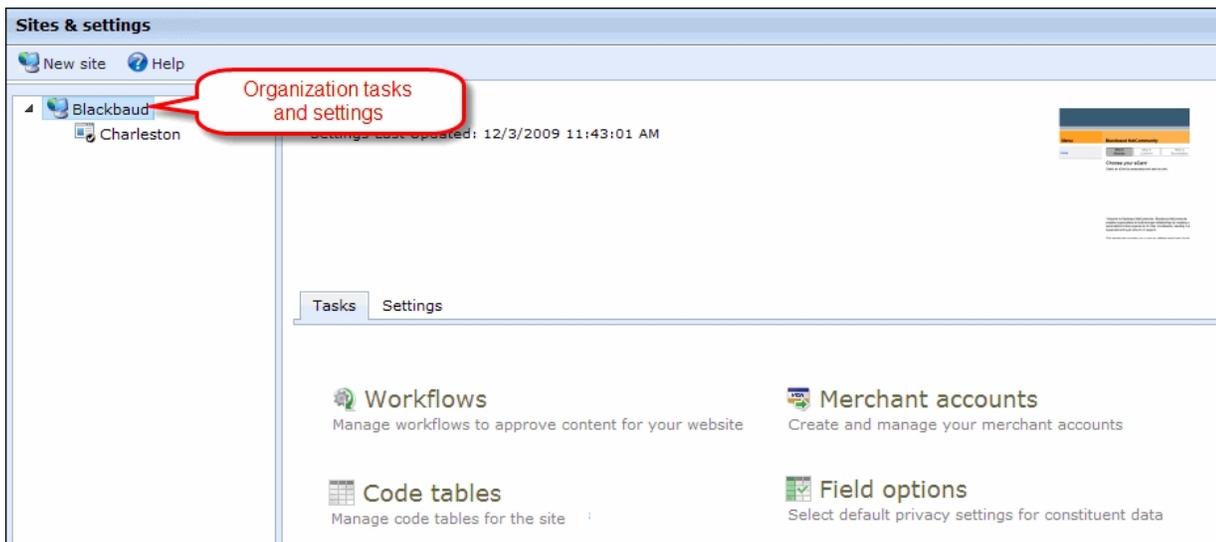
Warning: We strongly recommend that you only assign full Supervisor rights for *Sites & settings* to a select group of users. General users should not access this section of the program because changes can affect multiple web pages and sites. Only users knowledgeable in all areas of website creation and publishing should perform tasks in *Sites & settings*.

Single Site

When you host a single website, all tasks and settings apply to the website. If you add additional sites, the organization tasks and settings still apply to all sites, but you select site-specific tasks and settings for each new site.

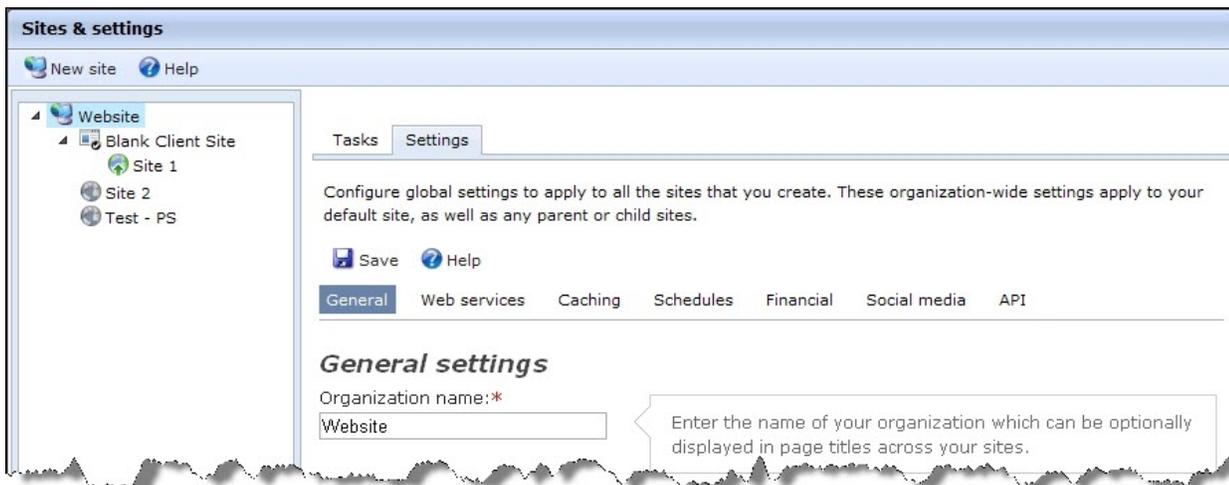
Organization Tasks and Settings — Single Site

In *Workflows*, *Code tables*, *Merchant accounts*, and *Field options*, you apply global organization tasks to your entire website. To access these options, select the top-level item in the *Sites & settings* treeview. This top-level item most likely displays your organization's name. The Tasks tab appears.



For information about these areas, see [Workflows on page 71](#), [Code Tables on page 85](#), [Merchant Accounts on page 76](#), and [Field Options on page 83](#).

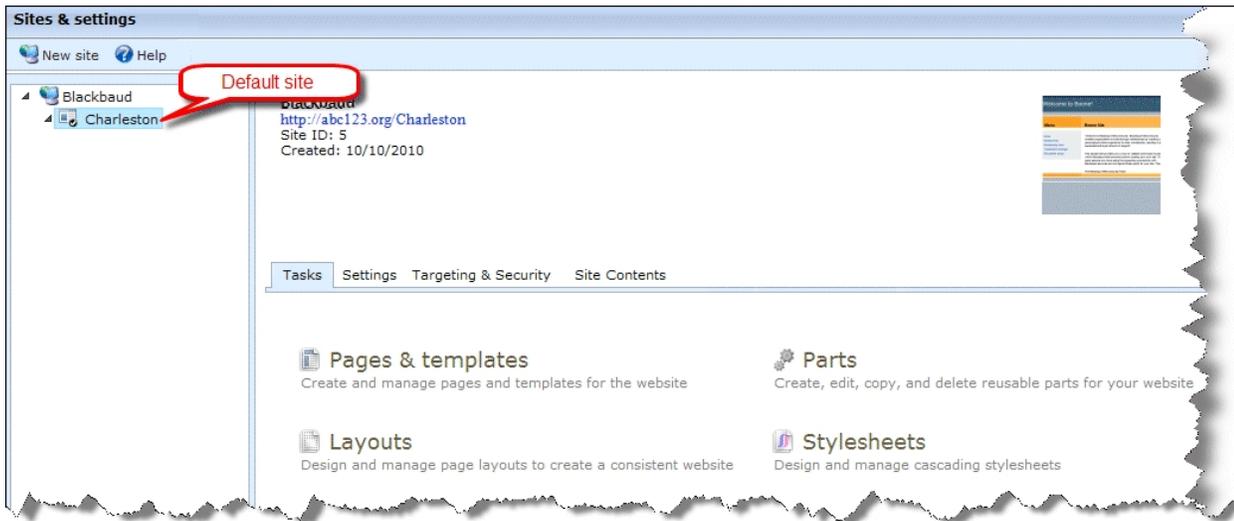
To access organization settings such as web services, caching, and service scheduling, select the Settings tab.



For information about organization settings, see [Organization Settings on page 26](#).

Default Site — Single Site

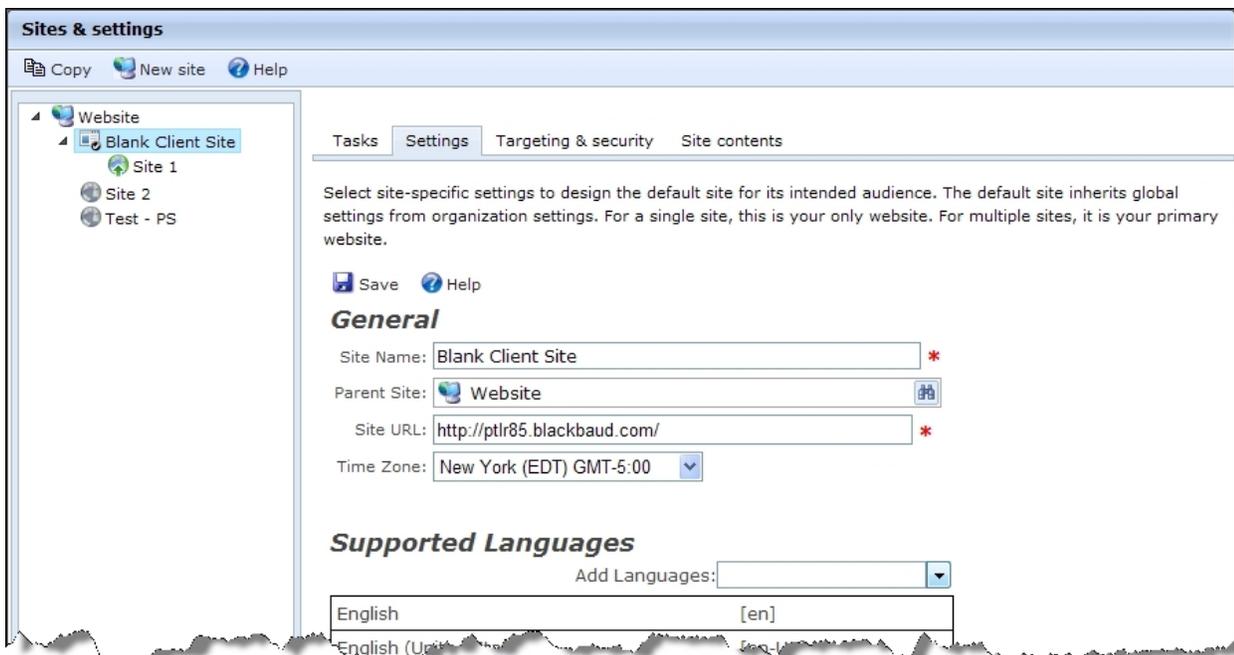
To select site-specific settings when you host a single website, select the default site in the *Sites & settings* treeview. On the Tasks tab, you design your site from sections such as *Pages & templates*, *Parts*, and *Friendly URLs*.



Note: After you create an item on the Tasks tab, you can access it from the corresponding section in *Site explorer*. For example, after you create a Donation Form part on the Tasks tab, you can access it by clicking **Site explorer, Parts** in the menu bar.

For information about the website design tasks on the Tasks tab, see the *Website Design Guide*.

On the Settings tab, you select site-specific settings such as languages to support, registration and login options, and whether to use reCAPTCHA for payments.

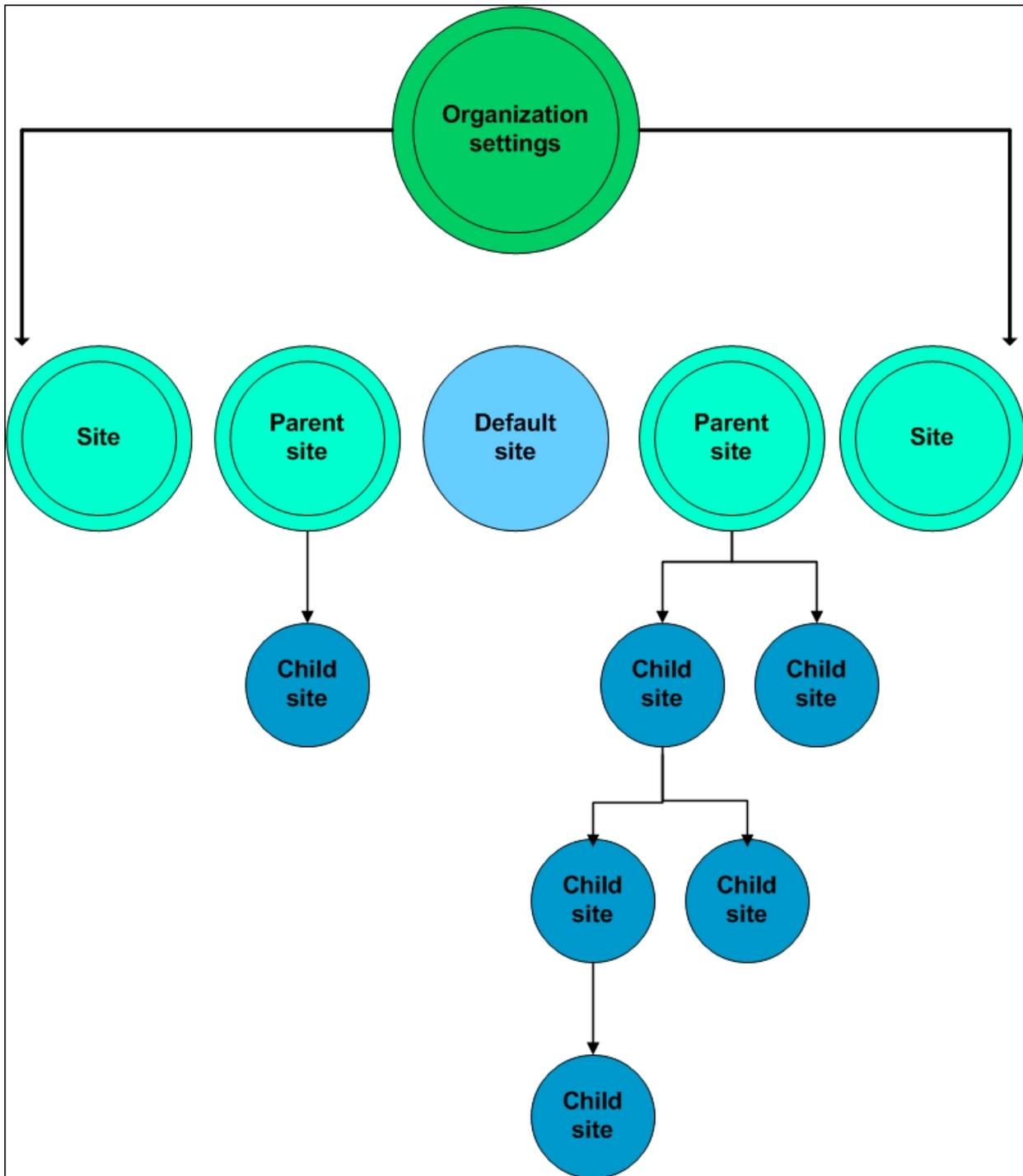


For information about site-specific settings, see [Site Settings on page 52](#).

On the Targeting & security tab, you assign security rights for the site's users and roles. For example, you can grant edit rights to allow a role to edit site settings. On the Site contents tab, you view data about the default website site such as the number of images, pages, and parts.

Multiple Sites

When you host multiple sites, you select global organization tasks and settings that apply to all sites, as well as site-specific tasks and settings for each default, parent, and child site. Your website always includes a default site, and you can create an unlimited number of additional sites. You can create any combination of parent and child sites, and the program does not limit the hierarchy structure. For example, you can create multiple parent and child sites, and child sites can be parent sites to additional child sites.

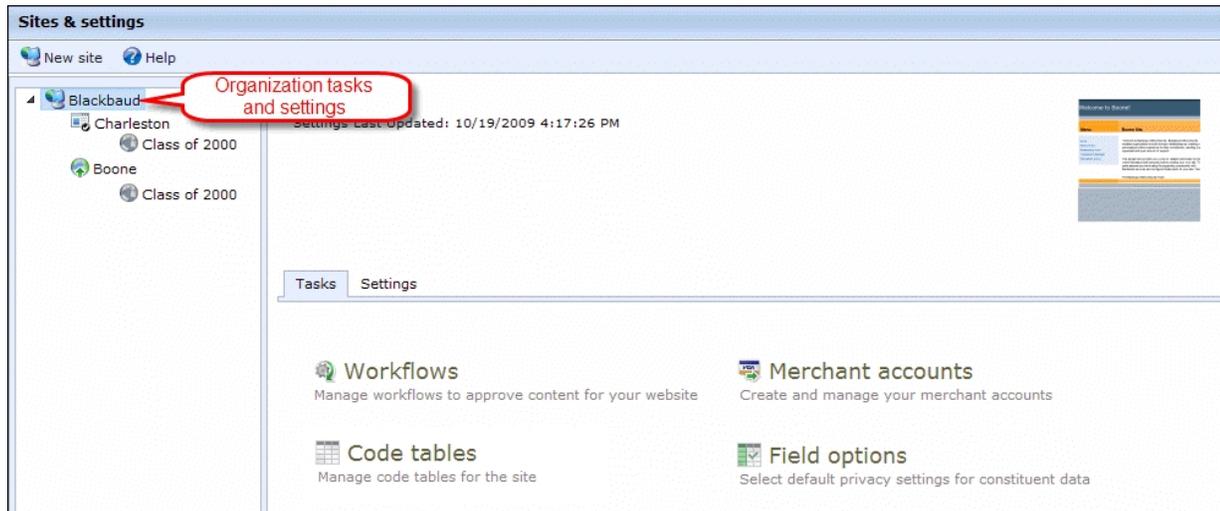


Multiple sites can benefit your organization in several ways. You can create sites for intranets, chapters, affiliates, and large campaigns, and you can customize their content, appearance, and security for targeted audiences. You can also hide sites that should not appear on the Internet and archive old sites.

For more information about organization settings and default, parent, and child sites, review the information in this section.

Organization Tasks and Settings — Multiple Sites

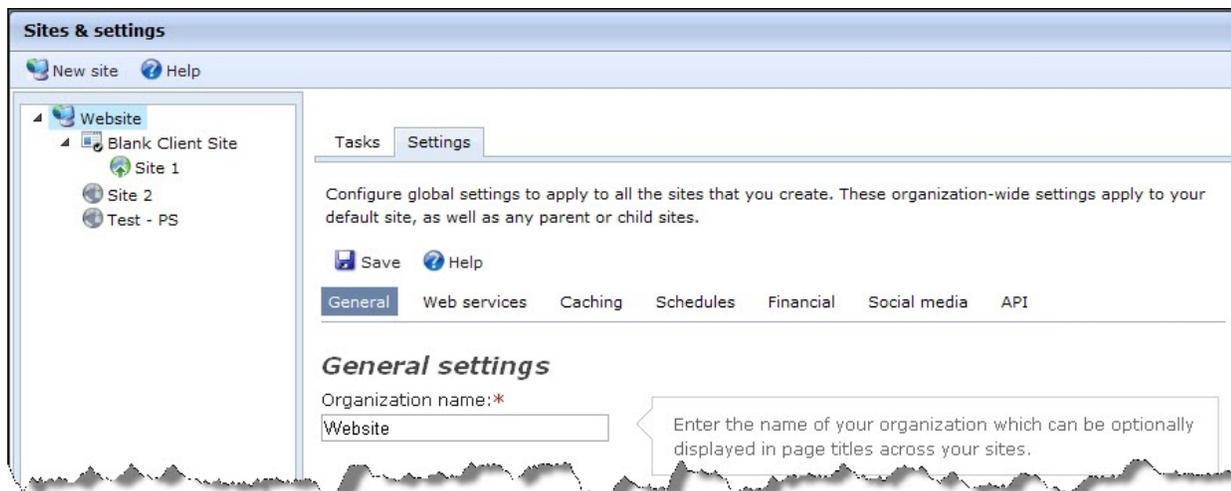
In *Workflows*, *Code tables*, *Merchant accounts*, and *Field options*, you apply global organization tasks to your entire website. To access these options, select the top-level item in the *Sites & settings* treeview. This top-level item most likely displays your organization's name. The Tasks tab appears.



These options are not site-specific. They apply to all default, parent, and child sites. For example, the code tables and merchant accounts that you configure are available on all sites. For information about these areas, see [Workflows on page 71](#), [Code Tables on page 85](#), [Merchant Accounts on page 76](#), and [Field Options on page 83](#).

Note: Settings in *Email* and *Users & security* also apply globally to all sites. To access these areas, select **Email** and **Users & security** in the menu. For more information, see the *Email Guide* and the *Users & Security Guide*.

To access organization settings, such as web services, caching, and service scheduling, select the Settings tab for the top-level item in the *Sites & settings* treeview.



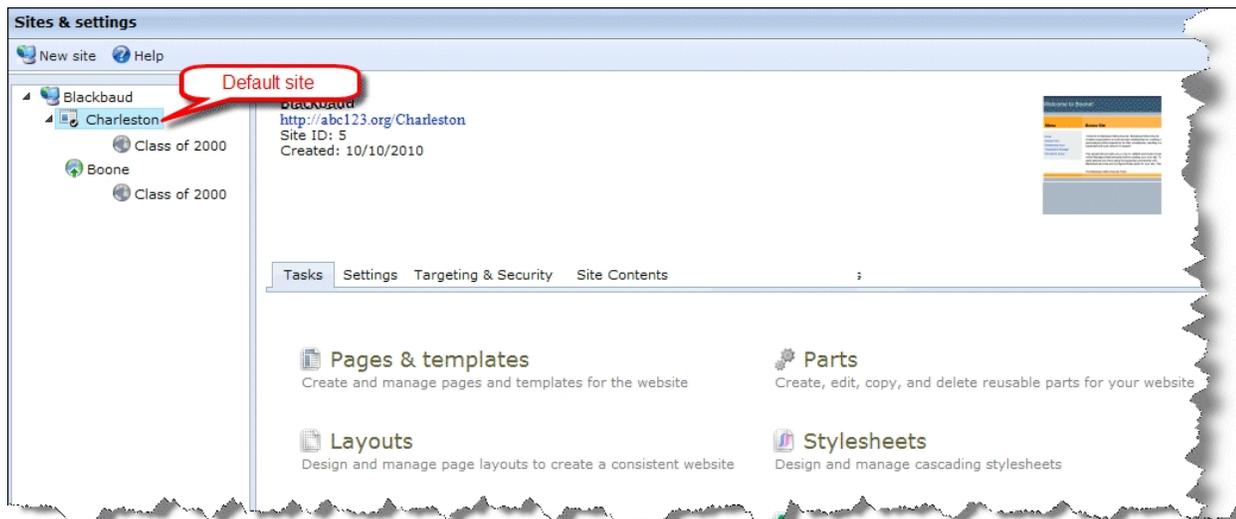
For more information about organization settings, see [Organization Settings on page 26](#).

Default Site — Multiple Sites

When you host multiple websites, the default site is your primary site. You design the default website and select its settings just like other sites. The only difference is that the program redirects users to the default site when they click URLs and it cannot determine where to navigate to. For example, if users click links to archived sites, the home page of your default site appears. The default site receives all unresolvable URLs that the program cannot render.

Note: The default site can be a parent site, child site, or both. This means the default site can be a parent site with child sites and also the child site of a parent site.

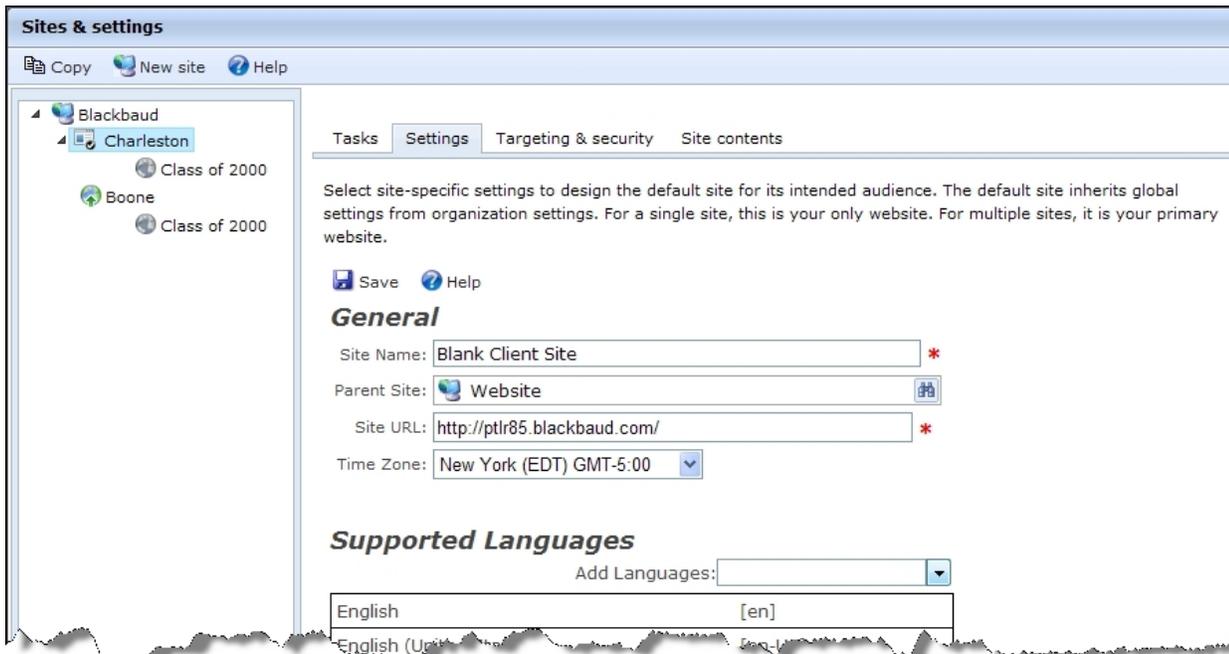
To manage your default site, select it in the *Sites & settings* treeview. You can identify it by the unique default site icon. On the Tasks tab, you design your site from sections such as *Pages & templates*, *Parts*, and *Friendly URLs*.



Note: After you create an item on the Tasks tab, you can access it from the corresponding section in *Site explorer*. For example, after you create a Donation Form part on the Tasks tab, you can access it by clicking **Site explorer, Parts** in the menu bar.

For information about the website design tasks on the Tasks tab, see the *Website Design Guide*.

On the Settings tab, you select site-specific settings such as languages to support, registration and login options, and whether to use reCAPTCHA for payments.

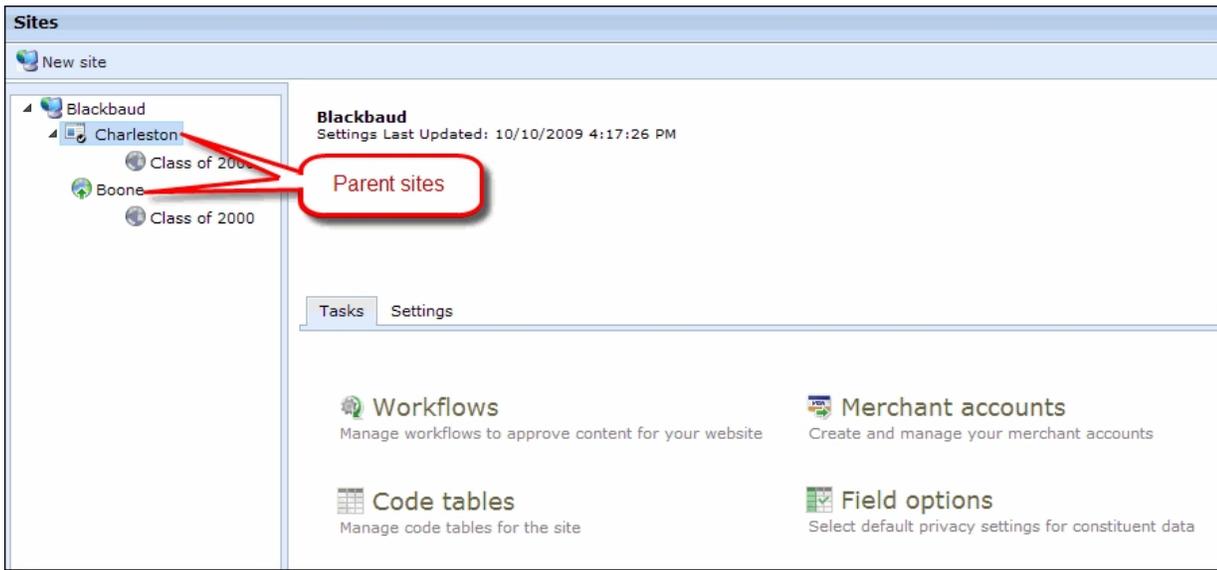


For information about default site settings, see [Site Settings on page 52](#).

On the Targeting & security tab, you assign security rights for the site's users and roles. For example, you can grant edit rights to allow a role to edit site settings. On the Site contents tab, you view data about the default website site such as the number of images, pages, and parts.

Parent Site — Multiple Sites

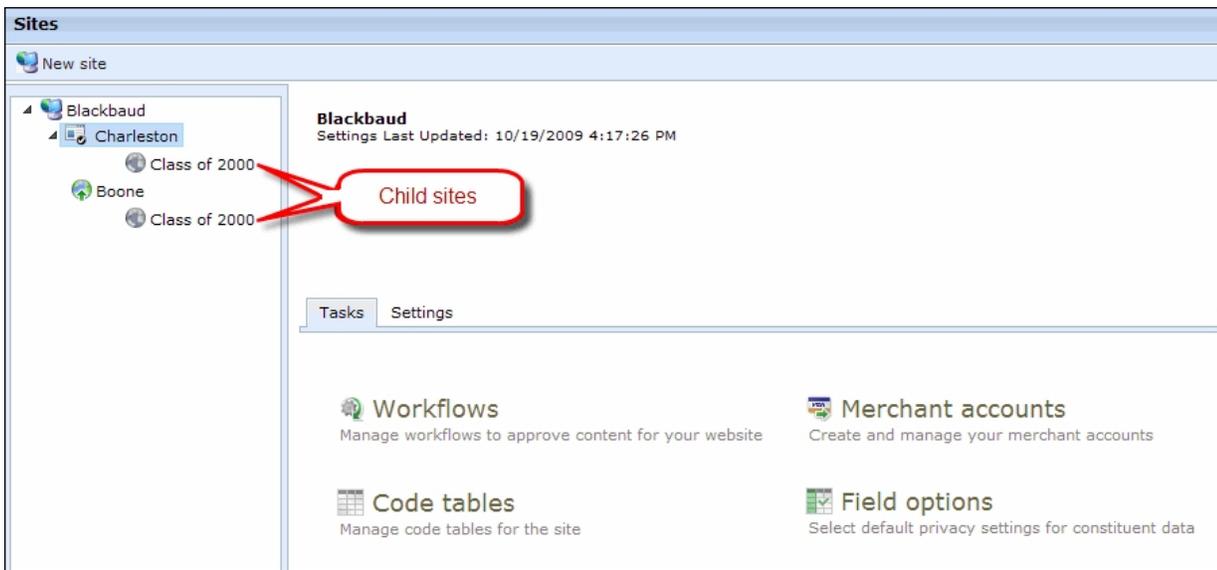
You manage parent sites the same way as the default site. Select the parent site in the *Sites & settings* treeview. On the Tasks tab, you design your site from sections such as *Pages & templates*, *Parts*, and *Friendly URLs*. On the Settings tab, you select site-specific settings such as languages to support, registration and login options, and whether to use reCAPTCHA for payments.



For information about how to create a site, see [Manage a Parent or Child Site on page 15](#).

Child Site - Multiple Sites

A parent site can contain child sites. You manage child sites the same way as default and parent sites. Select the child site in the *Sites & settings* treeview. On the *Tasks* tab, you design your site from sections such as *Pages & templates*, *Parts*, and *Friendly URLs*. On the *Settings* tab, you select site-specific settings such as languages to support, registration and login options, and whether to use reCAPTCHA for payments.



For information about how to create a site, see [Manage a Parent or Child Site on page 15](#).

Note: You can select for child sites to inherit security assignments from parent sites. You can also edit

the inherited security settings for a child site. For more information, see the *Users & Security Guide*.

Manage a Parent or Child Site

Review this section to learn about the procedures for parent and child sites.

Warning: We strongly recommend that you only assign full Supervisor rights for *Sites & settings* to a select group of users. General users should not access this section of the program because changes can affect multiple web pages and sites. Only users knowledgeable in all areas of website creation and publishing should perform tasks in *Sites & settings*.

➤ Create a parent or child site

Multiple sites can benefit your organization in several ways. You can create sites for intranets, chapters, affiliates, and large campaigns, and you can customize the content, appearance, and security for targeted audiences. You can create an unlimited number of sites at any level in a hierarchy.

1. From *Administration*, click **Sites & settings**. *Sites & settings* appears.
2. Select the default site or parent site in the treeview and click **New site**. The Create New Site page appears.

Create New Site

Save Help Return

Create new site

You can create an unlimited number of sites. You can create any combination of parent and child sites at any level in the hierarchy.

New site name: *

Enter a name to appear in the **Sites** treeview.

Parent site:

Blank Client Site

Select the parent site. By default, the program uses the site you selected in the **Sites** treeview.

New site URL: *

Enter a URL and click **Validate**. The program confirms that the domain maps to the installation.

Validate

3. In the **New site name** field, enter a name to identify the site in the program. The name only appears in the *Sites & settings* treeview. Website users do not view it.
4. In the **Parent site** field, select the parent site.
5. In the **New site URL** field, enter your site URL.
6. To verify the URL, click **Validate**. The program confirms this domain maps to the location of your program installation. When it does not, a message appears to inform you the URL is not valid. If this occurs, check your Domain Name System (DNS) configuration.

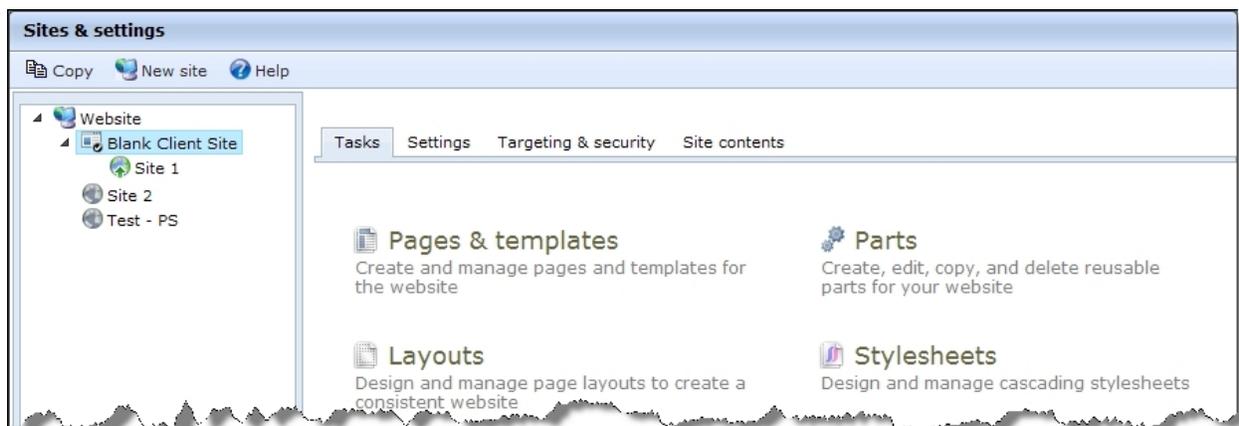
You can enter URLs such as `http://www.example.org` or `http://www.example.org/cambridge`. To enter a subdomain URL such as `http://www.cambridge.example.org`, you must configure the subdomain outside of the program. For more information, contact your System Administrator.

7. Click **Save**. You return to *Sites & settings* and the site appears in the *Sites & settings* treeview.

► Edit a site

You edit the site name, parent, and URL for a site in site settings. For more information, see [General site settings on page 52](#).

1. In the *Sites & settings* treeview, select the site to edit. The Tasks tab appears.



2. On the Tasks tab, edit tasks for website design as necessary. You can edit pages, templates, layouts, forms, friendly URLs, parts, style sheets, images, and approvals. For more information, see the *Website Design Guide*.
3. On the Settings tab, edit site-specific settings such as languages to support, registration and login options, and whether to use reCAPTCHA for payments.

Tasks Settings Targeting & security Site contents

Select site-specific settings to design the default site for its intended audience. The default site inherits global settings from organization settings. For a single site, this is your only website. For multiple sites, it is your primary website.

Save Help

General

Site Name: *

Parent Site: Website

Site URL: *

Time Zone: ▾

Supported Languages

Add Languages: ▾

Note: To change a site URL, enter a new one in the **Site URL** field. If a message appears that informs you the URL is not valid, check your Domain Name System (DNS) configuration. For more information about the **Site URL** field, see [General site settings on page 52](#).

- On the Targeting & security tab, assign security rights for the site's users and roles. For example, you can grant edit rights to allow a role to edit site settings.

Tasks Settings Targeting & security Site contents

To target this site to specific users, add users or roles to the site and assign permissions for the site.

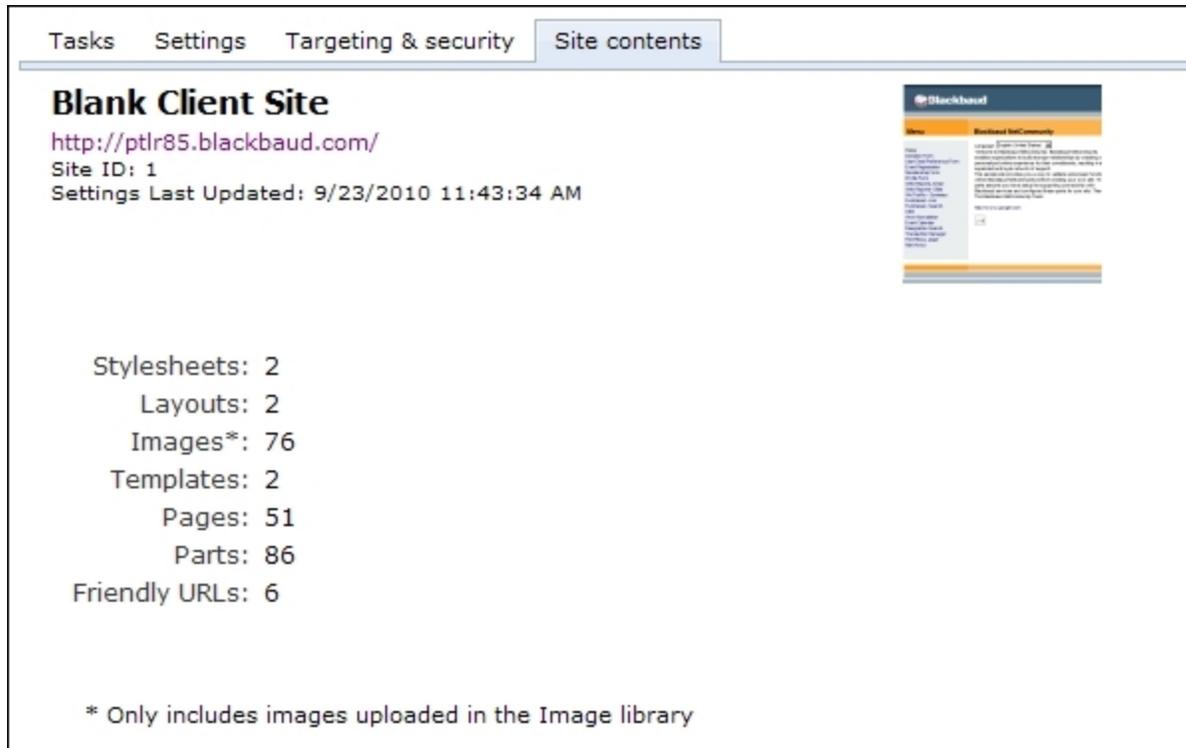
Save

Action	User/Role Name	Edit	Change Security
	Everyone	<input type="checkbox"/>	<input type="checkbox"/>

+ Add users and roles

For more information about the Targeting & security tab, see the *Parts Guide*.

- On the Site contents tab, view data about the site such as the number of images, pages, and parts.



- To edit another site in *Sites & settings*, you can select it in the *Sites & settings* treeview.

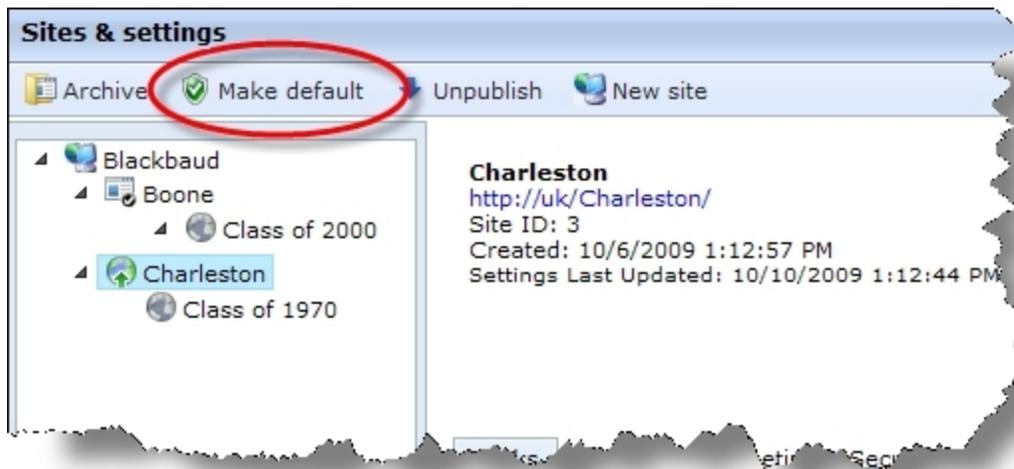
➤ Select a default site

The program requires a default site. When you host one site, the default site is your only website. When you host multiple websites, you select a default site to serve as your main website. The default site receives all unresolvable URLs that the program cannot render. For example, when users click links to archived sites, the home page of your default site appears.

- In the *Sites & settings* treeview, select a site.
- Click **Make default**.

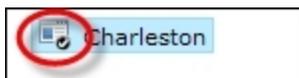
Note: Only users with Supervisor rights can designate the default site.

The default site can be a parent site, child site, or both.



Tip: The **Make default** button does not appear if the site is not published. You must publish the site to select it as the default site. For more information, see [Publish a site on page 19](#).

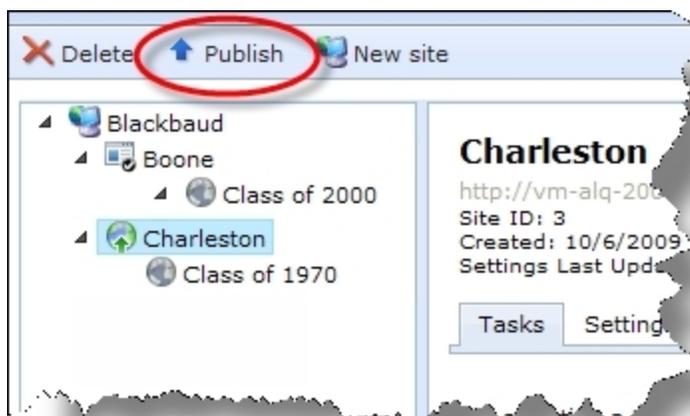
The default site icon identifies the default site in the *Sites & settings* treeview and no longer appears for the previous default site.



➤ Publish a site

Before you publish a site, it must contain an authorization failed page, home page, and privacy page. For more information, see [Page settings on page 55](#).

1. In the *Sites & settings* treeview, select a site.
2. Click **Publish**.



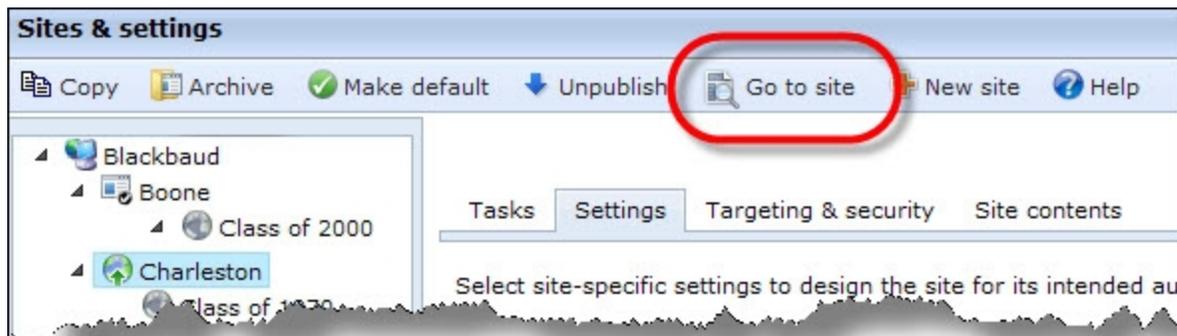
The publish process begins. After it completes, you can access the website.

Tip: You cannot create a site with the same URL as a published or unpublished site.

Note: You can unpublish or archive a site to limit access to Supervisor users and registered users with administrative rights. For more information, see [Unpublish a Site on page 20](#) or [Archive a Site on page 20](#).

Go to Site

To quickly navigate to a site, click **Go to site**.



To create content such as a part or email for an individual site, highlight the site in the treeview and click **Go to site**. You will automatically log in to the site.

Unpublish a Site

The **Unpublish** button appears for published sites. If you unpublish a site, only Supervisor users and registered users with administrative rights can access the site. You can unpublish a site to hide it from users while you make updates. When you unpublish a site, you cannot create a site with the same URL.

Archive a Site

To remove a site from the Internet but retain it in the database, you can archive it. You can access an archived site from the *Sites & settings* treeview, but you cannot edit it.

Only Supervisor users and users with Edit site rights can archive a site. After you archive a site, only Supervisor users and registered users with administrative rights can access it through the URL.

The **Archive** button appears for a site under these conditions:

- The site is not the default site.
- You are not currently working in the site. To verify your current site, check the URL or the breadcrumbs beneath the menu bar.
- You have rights to delete the site.

To archive a parent or child site, select it in the *Sites & settings* treeview and click **Archive**. If you archive a parent site, you also archive its child sites.

A **Restore** button appears for archived sites. Supervisor users and users with Edit site rights can use this button to activate the archived site. You must publish the site again for it to appear on the Internet. For information, see [Publish a site on page 19](#).

Tip: You cannot create another site using the same URL as a published, unpublished, or archived site.

Copy a Site

When you create a site, you can base it on an existing site to save time on tasks such as web design and part configuration. This creates a site with existing layouts, templates, and settings that you can update as necessary, which is useful for recurring events and programs such as walk-a-thons or campaigns.

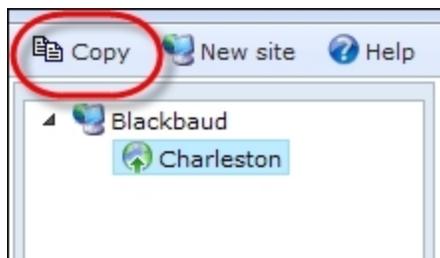
Note: You can copy any site in the database, including the default site and any parent or child site.

When you copy a site, you select one of four options to determine the content to copy. The program copies parts in one of three ways. Some parts are automatically shared between the original site and the new site, and select parts are shared when you use an option to share them from a template with other sites. Other parts are duplicated to create separate parts for the new site.

Tip: If you do not want to copy an entire site, you can move content, such as parts and layouts, from their current site to another site. For example, to move a Donation Form part, select another site in the **Assign to site** field on the Properties tab for the part.

> Copy a site

1. In the *Sites & settings* treeview, select a site.
2. Click **Copy**. The Copy Site page appears.



3. Under **Copy site**, enter settings such as the site name. For information about these options, see [Create a parent or child site on page 15](#).
4. Under **Select content to copy**, select the content to copy for the new site.

Tip: The program copies all site settings from the original site to the new site. You can edit the site settings as necessary. For example, you can adjust site tracking settings so *Google Analytics* tracks only the new site. For information about settings, see [Settings on page 25](#).

Content to copy

The program copies all site settings from the source site to the new site, but you select whether to copy content. If so, the program creates duplicate content or shares content between the sites.

All
 Templates
 Layouts
 Settings only

This option copies all content from the source site. This includes:

Style sheets	Layouts	Templates	Email Templates	eCard Templates	Pages	Parts	Friendly URLs	Images*
1	2	2	1	0	21	32	4	4

* Includes images from *Image library* only

Copy security settings

Select this option to copy permissions from the site's Targeting & security tab, security assignments, and permissions from the Targeting & security tabs on pages and parts.

- **All** — To copy the entire content and design, select **All**. The option provides details such as the number of images, pages, and parts to copy.
- **Templates** — To copy templates for pages, email, and eCards, select **Templates**. This does not copy the pages, friendly URLs, email messages, or eCards that use the templates.

Note: The **All** and **Templates** options copy parts. Some parts are shared between the original site and the new site, while other parts are duplicated to create separate parts for the new site.

- **Layouts** — To copy only style sheets, layouts, and images, select **Layouts**.

Note: The **All**, **Templates**, and **Layouts** options copy images from *Image library* but not images uploaded by website users such as profile images on the User Networking part.

- **Settings only** — To copy only site settings, select **Settings only**.
- To copy security settings, select **Copy security settings**. This copies the original site's security permissions from the Targeting & security tab, as well as security assignments. It also copies security permissions from the Targeting & security tabs on parts and pages.
For information about the Targeting & security tab, see the *Parts Guide*. For information about security assignments, see the *Users & Security Guide*.
 - To create the new site, click **Copy site**. A process page appears. After the process, "Complete" appears.

Note: To undo the copy and remove the new site, click **Undo copy** on the process page. The program removes the site and all duplicated content from the database. Shared content remains in the database for the original site.

- To update the new site's settings, click **Go to site settings**. The Settings tab appears. For information about site settings, see [Site Settings on page 52](#).

The new site does not appear on the Internet. For information about how to publish it, see [Publish a site on page 19](#).

Duplicate Parts

When you copy a site and its parts, the parts copy in one of three ways. Some parts are automatically shared between the original site and the new site, and select parts are shared when you use an option

to share them from a template with other sites. Other parts are duplicated to create separate parts for the new site.

The following parts are duplicated when you copy a site and its parts. The "*" indicates parts that do not include website user data. For example, the Discussion Group part is duplicated but its posts are not.

Note: Parts that are not in the list are shared between the original or template site and the new site . For information about shared parts, see [Shared Parts on page 24](#). For information about shared template parts, see [Shared Template Parts on page 25](#).

- Anonymous Newsletter Subscription
- Change User ID/Password
- *Content Comparison
- Directory
- *Discussion Group
- *Documents
- Donation Form
- eCards
- Email Forwarding Form
- *Event Calendar
- *Event Calendar Group
- *Event Calendar Highlights
- Event Registration Form
- Flash Player
- Frame
- Giving Search
- Language Selector
- Menu
- Navigation Buttons
- News Reader
- Page Sharing
- Payment
- Payment 2.0
- Payment Summary
- *Poll
- Profile Display
- Profile Form
- Quick Search

- Search
- Sponsorship Form
- Sponsorship Search
- *Survey
- Tag Display
- Targeted Content
- Transaction Manager
- User Email Preferences Form
- User Interests Form
- User Link Module
- User Login
- User Photos Form
- *Weblog

Shared Parts

When you copy a site and its parts, the parts copy in one of three ways. Some parts are automatically shared between the original site and the new site, and select parts are shared when you use an option to share them from a template with other sites. Other parts are duplicated to create separate parts for the new site.

The following parts are automatically shared when you copy a site and its parts.

Note: Parts that are not in the list are shared between the template site and the new site, or are duplicated to create separate parts for the new site. For information about shared template parts, see [Shared Template Parts on page 25](#). For information about duplicate parts, see [Duplicate Parts on page 22](#).

- Action Item Center
- Chapter Links
- Chapter Manager
- Chapter Page Element
- Designation Display
- Designation Search
- Elected Officials Search
- Giving History
- Job Board
- Menu (Deprecated)
- My Friends
- Payment Summary 2.0

- Personal Page Element
- Personal Page Manager
- Report (Email)
- Report (Web Traffic)
- Scrolling Donor Display
- Sponsorship Status
- Suggested Content
- User Networking Manager
- Volunteer Opportunity

Shared Template Parts

When you copy a site and its parts, the parts copy in one of three ways. Some parts are automatically shared between the original site and the new site, and select parts are shared when you use an option to share them from a template with other sites. Other parts are duplicated to create separate parts for the new site.

The following parts are shared when you share them from a template with other sites.

Note: Parts that are not in the list are shared between the original site and the new site, or are duplicated to create separate parts for the new site. For information about shared parts, see [Shared Parts on page 24](#) For information about duplicate parts, see [Duplicate Parts on page 22](#).

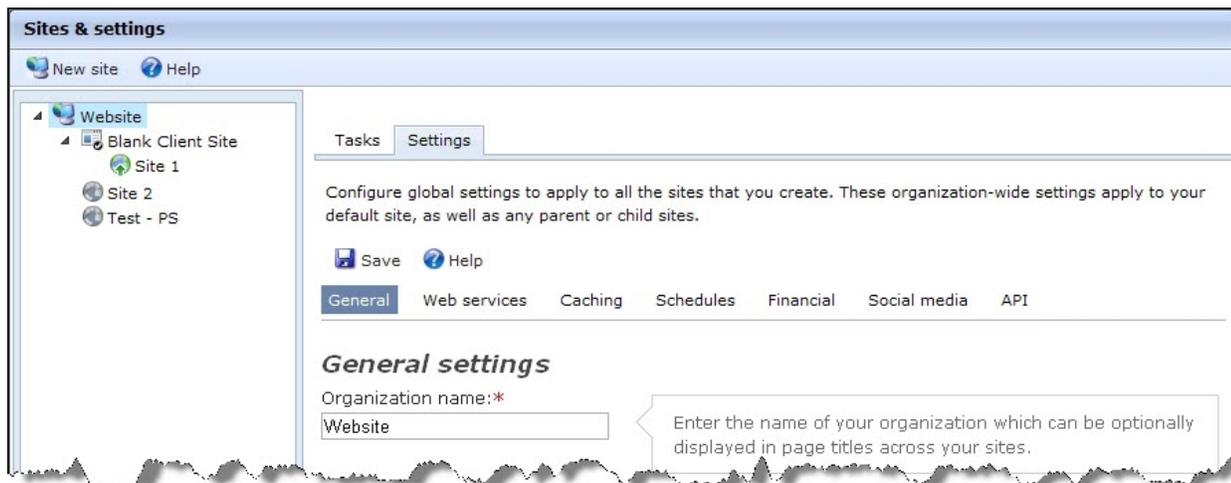
- Formatted Text and Images
- Formatted Text and Images (secured)
- Slideshow
- Unformatted Text

Note: If you do not select the option to share a part, it is duplicated to create a separate part when you copy the site.

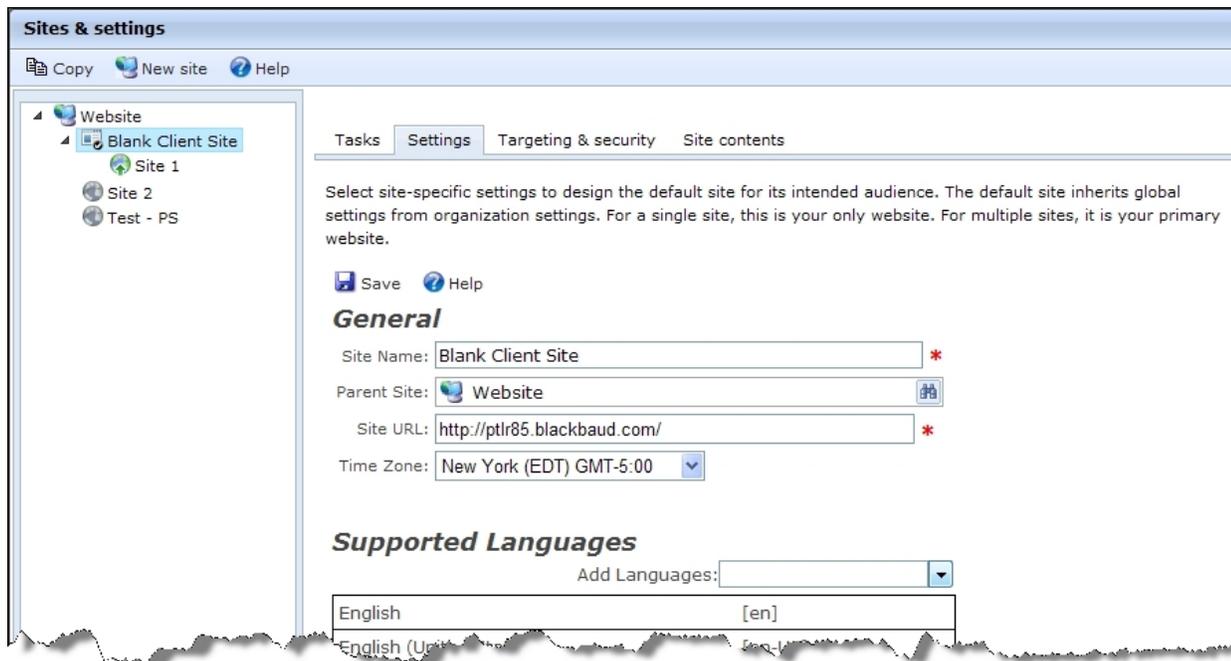
Settings

There are two types of settings in *Sites & settings*: organization settings and site settings.

Organization settings are global settings that apply to all sites you host. To access organization settings, select the Settings tab from the top-level item in the *Sites & settings* treeview.



Site settings are site-specific settings that apply to default, parent, or child sites. To access site settings, select the Settings tab from a default, parent, or child site in the *Sites & settings* treeview.



Organization Settings

Organization settings are global settings that apply to all sites you host. These settings include web services, caching, and service scheduling. All default, parent, and child sites inherit organization settings.

Warning: We strongly recommend you assign full Administrator rights to only a select number of users for organization settings. General users should not have access to these settings because any change can affect multiple websites and web pages.

General

Under **General**, enter global settings for your organization such as spell check settings and integration options. For example, you can select an HTML tag to define line breaks in content and whether to require Secure Sockets Layer for pages.

> General organization settings

1. In the **Organization name** field, enter the name of your organization.

General settings

Organization name:

Enter the name of your organization which can be optionally displayed in page titles across your sites.

Update user role:

When users log in to your website, **Blackbaud Internet Solutions** updates their roles. To allow users to log out and return without role refreshes, enter the interval to maintain role information. To disable the option, enter "-1."

Enable CRM security for linked CMS users

2. When users log in to your website, the program refreshes their roles. To allow users to leave the site and log in again without role refreshes, enter a role update interval in the **Update user role** field. During this interval, the program does not refresh roles when users log in again. To disable this option, enter "-1."

Tip: We recommend you enter "-1" to disable the option and manage role refreshes with the role refresh interval instead. You set the role refresh interval under **Role refresh** on the Service schedules tab. The **Update user role** option can impact performance when the site refreshes roles for each user on each login, or on each login after the specified interval. The performance impact depends on the number of users who log in and query-based roles the site refreshes. For information about the role refresh interval, see [Schedules on page 39](#).

3. To provide a way for Blackbaud Internet Solutions to honor Blackbaud CRM rights, select **Enable CRM security for linked CMS users**. For example, if you select this checkbox and a user has rights only to the Annual Fund designation in Blackbaud CRM, then that user can only access the Annual Fund designation in Blackbaud Internet Solutions.

Note: When you select the checkbox, users who are not linked to a CRM application user in Blackbaud CRM do not have any CRM rights in Blackbaud Internet Solutions. Using the previous example, this means the user cannot access any designations in Blackbaud Internet Solutions. For information about how to link users, see the *Blackbaud CRM Security Guide*.

4. To apply a limited number of settings to a different environment that you use for testing, select **This is a non-production environment**.

The Production environment is your live website that all users can access anywhere. The non-production environment is for practice and testing purposes. When you switch to a non-production environment, you can practice and test certain functionality without impact to your

Production environment. For more information, refer to [Non-Production Environment on page 28](#).

- To save the settings, click **Save**.

Non-Production Environment

Under **General** organization settings, you can select **This is a non-production environment** when you want to test or disable specific functionality in an environment that is not available to website users and email recipients. When this checkbox is clear, your environment is live and set to Production.

Tip: This setting applies to each website you host, whether it is one site or multiple sites.

Currently, there are two features you can test in Production and Non-production environments. The following table lists the feature and what you can do in each environment. When more features become available to test in the Non-production environment, this table will update to include the latest information.

Feature	Non-production	Production
Secure payment template update organization setting	<p>When you update Blackbaud secure payment pages from static to responsive pages, a copy of each page template is created for you to view and test in the Non-production environment. This avoids interruption on your live, Production site.</p> <p>For more information about this setting, refer to Secure payment page template update on page 43.</p>	When you update Blackbaud secure payment pages from static to responsive pages in Production, the pages are live on all of your live websites.
Email jobs organization setting	<p>Disable email jobs sent from the <i>Email, Scheduled emails</i> functional area.</p> <p>Tip: The Non-production environment does not prevent an email job from sending to recipients when you use the Send after date field in <i>Messages</i> or <i>Marketing Efforts</i>.</p> <p>For information about this setting, refer to Email settings on page 40.</p>	Blackbaud Internet Solutions sends messages for email jobs from the <i>Email, Scheduled emails</i> to recipients as expected.

> Email settings

To use this setting, you must send email messages to query-based email lists that use constituents as the data source. You create the queries in Blackbaud CRM and then create email lists based on them in *Lists*. For information about email lists, see the *Email Guide*.

- To autofill forms with constituent data when users click links in email messages, select **Use email links to autofill forms**.

Email settings
 Use email links to autofill forms

To insert constituent data on forms when users click email links, select this option. The program pulls data such as addresses from constituent records even though users are not logged in. Autofill expires for the links after 30 days.

The setting autofills forms with biographical details such as name, title, primary address, phone number, and email address. When you include links to forms in query-based emails, the program pulls data from constituent records even when users are not logged in to your website.

The setting applies to forms that you create with Donation Form, Email Forwarding Form, Event Registration Form, User Email Preferences Form, and User Login parts. It does not apply to forms that require users to log in because email links do not bypass login requirements.

Warning: If a recipient forwards a query-based email and someone else follows a link from the email message to a web form, the original recipient's biographical details autofill the form.

- To send emails to each constituent when multiple records include the same email addresses, select **Send a unique email to each constituent who shares the same email address**. You typically select this when you want constituents, such as spouses, who share email addresses to each receive a copy of messages. If the emails include merge fields, the messages for each recipient are unique and populate each constituent's information.

 Send a unique email to each constituent who shares the same email address

When multiple constituents share the same email address, select this checkbox if you want each constituent to receive emails to that address. If the email includes merge fields, the message for each recipient is unique and populates with that constituent's information. When you do not select the checkbox, only one copy of the email is sent to the address, and any merge fields populate with information for the constituent whose record has been in **Blackbaud CRM** the longest.

This setting applies to constituents in an email list with a data source of Constituent or Imported. When you clear the checkbox, merge fields populate with information for the constituent whose record has been in the database the longest.

- To save the settings, click **Save**.

> HTML editors settings

- In the **Tag line for breaks** field, select an HTML tag to define line breaks in content created in the HTML editor. For example, if styles are applied to paragraph tags in your existing HTML content, select the paragraph tag to indicate line breaks. You can use the <p>, <div>, or
 tags.

HTML editors

Tag for line breaks:
 Select an HTML tag for line breaks in the content that you create with the HTML editor.

Spell check language:
 Select the language dictionary to use with the spell check.

Words to ignore:
 Enter words or phrases to include in the spell check dictionary. For example, enter your organization's name and other common words or phrases to allow on your site.

Words to correct:
 Enter words or phrases to remove from the spell check dictionary of safe words.

More rules for spell check:

- Ignore words capitalized and in all UPPERCASE
- Ignore words with any UPPERCASE letters
- Ignore Internet and file addresses
- Ignore words that contain numbers
- Ignore HTML

Safe HTML tags:

- APPLET
- BUTTON
- EMBED
- IFRAME
- INPUT
- NOSCRIPT

Select HTML elements that website users can access in HTML editors. The list includes potentially hazardous tags.

2. In the **Spell check language** field, select a language dictionary for spell check.
3. In the **Words to ignore** field, enter common words or phrases such as your organization's name to include in the language dictionary. Spell check ignores these words.
4. In the **Words to correct** field, enter words or phrases to remove from the dictionary. Spell check highlights these words as incorrect.
5. Under **More rules for spell check**, select the types of words for spell check to ignore.

- To ignore words if the first letter is uppercase or if all letters are uppercase, select **Ignore words capitalized and in all UPPERCASE**. This setting allows spell check to ignore proper nouns and acronyms.
 - To ignore words that contain any uppercase letters, select **Ignore words with any UPPERCASE letters**.
 - To ignore website addresses and filenames, select **Ignore Internet and file addresses**.
 - To ignore words that contain numerals, select **Ignore words that contain numbers**.
 - To ignore HTML code, select **Ignore HTML**. This setting allows spell check to ignore strings of code entered in the HTML editor.
6. Under **Safe HTML tags**, a list of potentially hazardous HTML elements appears. Select the HTML elements to allow in HTML editors on your website and in RSS feeds through the News Reader part. By default, all elements are included. To exclude an element, clear its checkbox.
- Warning:** If you do not select **SCRIPT**, in addition to all <script> tags, the program marks all HTML event attributes, such as onmouseover, and all href attributes that contain the string javascript: as unsafe.
7. To save the settings, click **Save**.

> Attributes settings

1. Under **Attributes**, select the active attributes from Blackbaud CRM to make available on the website. You can use attributes in multiple places in Blackbaud Internet Solutions, such as email messages and profile pages.

Tip: If you recently added a new attribute in Blackbaud CRM and it does not appear under **Attributes**, click **Refresh code tables** in *Code tables*. This updates code tables from Blackbaud CRM in Blackbaud Internet Solutions. For more information about how to update code tables, see [Code Tables on page 85](#)

Attributes

Constituent attributes:

Business Hours
 Committees
 Retirement Date

Select the constituent attributes that the parts on your website can access.

Education attributes:

Type
 Detail
 GPA

Select the education attributes that the parts on your website can access.

Note: You can use one-per-record attributes with types of Date, Text, Number, Currency, and Yes/No in the program. Table type attributes are available without being marked as one per record. Fuzzy Date, Constituent Name, Memo, and Time type attributes are not available.

2. To save the settings, click **Save**.

➤ Permissions for organization profiles settings

1. Under **Permissions for organization profiles**, select the relationship types that you allow to edit organization profiles. Website users with these relationships to an organization can edit its profile.



Permissions for organization profiles

- Benefic Provider
- Benefit Recipient
- Board Member
- Brother
- Brother-in-law
- Business Partner
- Charitable Society

Select the relationship types to assign permissions to. Website users can edit an organization's profile if they have any of these relationships with the organizations.

2. To save the settings, click **Save**.

➤ Titles settings

1. Under **Titles**, select the titles to include as options on your website. Users can select these titles in the **Title** fields on donation forms, profile forms, and other areas.



Titles

- Drs
- Father
- General
- Madam
- Master
- Miss

Select the titles to appear in the list of drop down options available for **Title** fields on web pages.

2. To save the settings, click **Save**.

➤ Addressee and salutation merge fields settings

1. To expose the **Addressee** and **Salutation** merge fields in *Email* and on the Directory, Profile Display, and Profile Form parts, select **Enable merge fields**. These fields pull name formats from the Names tab in Blackbaud CRM. For information about name formats, see the *Constituents Guide* for Blackbaud CRM.

Warning: The **Addressee** and **Salutation** merge fields do not inherit privacy settings from other fields, so these fields can expose data that you want to hide. For example, if you set the **First Name** field as private in *Field options* but not the **Addressee** field, the program displays first names when the addressees include this information.

Addressee and salutation merge fields

Enable merge fields

If enabled, *Blackbaud Internet Solutions* by default uses the primary addressee and primary salutation from *Blackbaud Enterprise* or you may select different types below.

Merge fields do not inherit privacy settings from other fields. For example, if name fields are private but the **Salutation** field is not, the **Salutation** field may display name information.

Addressee:

Salutation:

Select the addressee and salutation types for the merge fields. If these types are not set, the program uses the full name.

2. In the **Addressee** field, select the addressee type for the **Addressee** merge field.

3. In the **Salutation** field, select the salutation type for the **Salutation** merge field.

If you select **Enable merge fields** but do not select an addressee or salutation type, the program uses the primary addressee and salutation types from Blackbaud CRM. If you do not set primary addressee and salutation types, the program uses full names.

4. To save the settings, click **Save**.

> Name format types

1. To expose name format types on the Donation Form part, under **Name format types**, select the types to make available on your website. These integrate from the Name Format Options page in Blackbaud CRM. For information about name formats, see the Blackbaud CRM *Communications Guide*.

Name format types

Alumni mailing

Annual report

Default

Select the name format types to make available for your website. Name format types integrate from Blackbaud Enterprise.

2. To save the settings, click **Save**.

> Phone type mapping settings

- Under **Phone type mapping**, map phone types from Blackbaud Internet Solutions to Blackbaud CRM. Under **Blackbaud CRM phone type**, phone types in Blackbaud CRM appear. Under **Blackbaud Internet Solutions phone type**, select the corresponding phone types.
- In addition to the default phone types in Blackbaud CRM, you can map five additional phone types. Under **Blackbaud Internet Solutions phone type**, select the additional phone types. Under **Caption**, enter labels for the types in Blackbaud CRM.

Phone type mapping
Map the phone types in *Blackbaud Enterprise* to the corresponding phone types on the website.

<i>Blackbaud Internet Solutions</i> phone type	Caption	<i>Blackbaud Enterprise</i> phone type
Home		Home
Business		Business
Organizations		Business
Additional phone type 1	Additional Phone 1	
Additional phone type 2	Additional Phone 2	
Additional phone type 3	Additional Phone 3	
Additional phone type 4	Additional Phone 4	
Additional phone type 5	Additional Phone 5	

- To save the settings, click **Save**.

> Address options

Use address options to provide a way for website users to select an address type to associate with a new address or to select a different address for a transaction. When you select **Allow users to select a different address**, the **Address type** field appears on the web page when you include the address block for users to enter a new address. Also, the **Select an address** field appears on web pages that include transaction parts so users can select a different address to use for the transaction.

- Under **Address options**, select the checkbox to provide a way for website users to select an address type to associate with a new address or to select a different address for a transaction. Address types from Blackbaud CRM appear.

Address options

Allow users to select a different address

Select this checkbox so a website user can select an address type to associate with a new address or select a different address for a transaction. When you do not select the checkbox, the **Address Type** field does not appear when a user adds a new address and only the primary address appears for a transaction.

Billing
 Business
 Employment History
 Former Address
 Home
 Invalid

Select the address types from *Blackbaud Enterprise* to make available online.

When you do not select the checkbox, the **Address type** field does not appear when you include the address block for users to enter a new address. For web pages that include transaction parts, only the primary address appears.

2. Select the address types to make available online.

> Email address options

Under **Email address options**, you can select whether to allow website users to select email address types for their email addresses. When you select **Allow users to select a different email address**, the **Email address type** field appears on forms where users who are not logged in enter email addresses. In addition, the **Select an email address** field appears on forms where logged in users conduct transactions. These logged in users can then enter a new email address and select a different email address type to associate with it to avoid overwriting their existing email addresses.

Use email address options to provide a way for website users to select an email address type to associate with a new email address or select a different email address for a transaction. When you select **Allow users to select a different email address**, the **Email address type** field appears on the web page when you include the email address field for users to enter a new email address. Also, the **Select an email address** field appears on web pages that include transaction parts so users can select a different email address to use for the transaction.

1. Under **Email address options**, to provide a way for website users to select an email address type to associate with a new email address or to select a different email address for a transaction, select the checkbox. Email address types from Blackbaud CRM appear.

Email address options

Allow users to select a different email address

Select this checkbox so a website user can select an email address type to associate with a new email address or select a different email address for a transaction. When you do not select the checkbox, the **Email Address Type** field does not appear when a user adds a new email address and only the primary email address appears for a transaction.

Business
 Email
 email 2

Select the email address types from to make available online.

When you do not select the checkbox, the **Email address type** field does not appear when you include the email address field for users to enter a new email address. For web pages that include transaction parts, only the primary email address appears.

2. Select the email address types to make available online.
3. To save the settings, click **Save**.

Web Services

Under **Web services**, establish global service settings for the program, integration, customizations, and QAS address service.

➤ Blackbaud CRM web service settings

Under **Blackbaud CRM settings**, enter information about the web service that allows the website to communicate with Blackbaud CRM database.

1. In the **URL** field, enter the location of the web service.

Blackbaud Enterprise settings
Enter the web service URL and your login credentials to allow *Blackbaud Internet Solutions* to communicate with your *Blackbaud Enterprise* database.

URL:

User: Password:

Database number:

2. In the **User** and **Password** fields, enter the login credentials to connect to the web service.
3. In the **Database number** field, enter the database number for the web service from the registry.
4. To save the settings, click **Save**.

➤ Blackbaud services settings

Under **Blackbaud services**, enter information about Blackbaud-hosted services such as email servers. The program uses this information to communicate with the hosted service.

1. The **Host name** field displays the name of your Blackbaud host.

Blackbaud services
Enter your login credentials for Blackbaud-hosted services such as email servers. The program uses the credentials to communicate with your hosted services.

Host name: Use "https" to connect

User: Password:

Warning: Do not edit the **Host name** field unless Blackbaud Support instructs you to. If you change the host name, you may not be able to process donations or communicate with constituents.

- To access hosted services via HTTPS, select **Use “https” to connect**. Always select this checkbox unless Blackbaud Support tells you otherwise.
- In the **User** and **Password** fields, enter the login credentials provided by your Blackbaud account manager. If you do not have this information, send an email to solutions@blackbaud.com.
- To save the settings, click **Save**.

➤ Blackbaud Payment Service settings

Under **Blackbaud Payment Service**, enter the *Blackbaud Payment Service* login credentials provided by your Blackbaud account manager. To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), the program uses the *Blackbaud Payment Service* to securely store credit card and merchant account information.

- In the **User** and **Password** fields, enter the *Blackbaud Payment Service* login credentials provided by Blackbaud. If you do not have this information, contact Customer Support from Blackbaud's [website](#).

Blackbaud Payment Service

To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), *Blackbaud Internet Solutions* uses the *Blackbaud Payment Service* to securely store credit card and merchant account information. [Learn more about Blackbaud Payment Service](#). Enter your login credentials to allow the website to communicate with the service.

User: Password:

- To save the settings, click **Save**.

Note: For more information about how the program helps your organization comply with PCI DSS, as well as additional steps to secure sensitive cardholder information, see the *Payment Application Data Security Standards (PA DSS) Implementation Guide*.

➤ Custom service settings

Under **Custom service**, enter information about any custom service that you use for custom parts.

- In the **URL** field, enter the location of the custom service.

Custom service

If you use a custom service for your custom parts, enter the web service URL and login credentials to allow *Blackbaud Internet Solutions* to communicate with the service.

URL:

User: Password:

Database number:

- In the **User** and **Password** fields, enter the login credentials to connect to the custom service.

3. In the **Database number** field, enter the database number for the custom service from the registry.
4. To save the settings, click **Save**.

➤ QAS address service settings

Under **QAS address service**, enter information about the QAS address service that allows United Kingdom users to quickly and accurately enter addresses. After you set up this option, a **Find address** link appears beside the **Postcode** field on parts that process addresses. When users enter postcodes and click the link, a **Select Address** field lists addresses for the postcode. Users can select addresses to autofill the remaining address fields.

1. In the **URL** field, enter the QAS URL to integrate with the address service.

QAS address service

You can integrate with the QAS address service to allow users in the United Kingdom to search for addresses based on postcodes. This allows them to select addresses quickly and improves accuracy. Enter the address service URL and your login credentials to allow **Blackbaud Internet Solutions** to communicate with the service. For information about the QAS, [click here](#).

URL:

User: Password:

2. In the **User** and **Password** fields, enter your QAS credentials.
3. To save the settings, click **Save**.

To confirm the integration, visit a web page on your site that processes United Kingdom addresses. For example, visit a page that includes the Donation Form part. When integration is successful, a **Find address** link appears beside the **Postcode** field.

Caching

Under **Cache settings**, define how long to store items. To minimize repeated access to the database and web services, the program can store recently accessed items in a cache. If the program does not retrieve an item from the cache within the set time limit, it is removed from the cache.

➤ Cache settings

1. Enter how many minutes to store items placed in the cache while the program is running. If another cache setting applies to an item, that setting overwrites this value.

Cache settings

The program uses data caching to minimize repeated access to the database and web services. Enter how long to store items in cache.

Application:
 minutes

Code tables:
 minutes

News reader:
 minutes

News feed:
 minutes

Enter how long to store information for **Blackbaud Internet Solutions**. Settings for specific types of data can also be set below.

Enter how long to store code tables from **Blackbaud Enterprise**.

Enter how long to store Really Simple Syndication (RSS) for a News Reader part.

Enter how long to store RSS content for a Weblog part.

Note: If you do not define cache settings, the program cache uses the .NET default of 20 minutes.

2. In the **Application** field, enter how long to store objects, content, and settings that the web service retrieves from the database.
3. In the **Code tables** field, enter how long to store code tables and table entries that the web service retrieves from the database.
4. In the **News reader** field, enter how long to store Really Simple Syndication (RSS) or Atom content retrieved for the News Reader part.
5. In the **News feed** field, enter how long to store RSS content created by the Weblog part.
6. To save the settings, click **Save**.

Schedules

Under **Schedules**, establish schedules for services such as email jobs, email lists, and role refreshes.

Tip: To maximize performance, schedule these services to run independently of each other. For example, avoid starting the **Email job** and **Blackbaud CRM Integration** schedules at the same time. Services do not stop if this is unavoidable, but it may take longer for them to complete.

> Email settings

1. Under **Email jobs**, select how often to run the process to send email messages.

Email jobs

Select how often to send email jobs.

Frequency:

Never
 Every (minutes)
 Daily at : AM

Last run: 2/6/2012 11:08 AM
✔ Completed successfully

Tip: If you are in a different time zone than your web server, select times based on your web server's time zone. The program does not use your organization's default time zone or the local time zone of the user who sets the schedule.

- To not run the process, select **Never**.
 - To send email at regular intervals, select **Every [] (minutes)** and enter the interval between instances of the process.
 - To send email once a day, select **Daily at** and select the time to run the process.
2. To save the settings, click **Save**.

Note: The program does not use this schedule to send acknowledgment emails that are automatically generated when website users submit a donation. The program only uses this schedule to send email messages and staff notifications. For information about messages and staff notifications, refer to the *Email Guide*.

> List acquisition and refresh settings

1. Under **List acquisition and refresh**, select how often to run the process to acquire and refresh the email lists.

List acquisition and refresh

Select how often to acquire and refresh email lists.

Frequency:

Never
 Every (minutes)
 Daily at : AM

Last run: 2/2/2012 12:52 PM
✔ Completed successfully

- To not run the process, select **Never**.
- To acquire and refresh email lists at regular intervals, select **Every [] (minutes)** and enter the interval between instances of the process.

- To acquire and refresh email lists once a day, select **Daily at** and select the time to run the process.

Tip: If you are in a different time zone than your web server, select times based on your web server's time zone. The program does not use your organization's default time zone or the local time zone of the user who sets the schedule.

2. To save the settings, click **Save**.

> Role refresh settings

1. Under **Role refresh**, select how often to run the role refresh process.

Note: When you configure standard role refresh, the program caches the information rather than load it by a SQL call on every login. For more information, see the *Users & Security Guide*.

Role refresh

Select how often to refresh your roles to include the most current member list. This ensures that when users log in, they are associated with the correct roles.

Frequency:

Never
 Every (hours)
 Daily at :

Last run: 2/6/2012 11:00 AM
✔ Completed successfully

- To not run the process, select **Never**.
- To refresh roles at regular intervals, select **Every [] (hours)** and enter the interval between instances of the process.
- To refresh roles once a day, select **Daily at** and select the time to run the process.

Tip: If you are in a different time zone than your web server, select times based on your web server's time zone. The program does not use your organization's default time zone or the local time zone of the user who sets the schedule.

2. To save the settings, click **Save**.

Note: By default, a member role refreshes every 24 hours after the member's last login. If your organization does not download the member to the database as part of a download transaction after the last login, there is no role to refresh. After you download the member, the role refreshes during the next login and the 24-hour interval is set to that date and time.

> Integration service settings

Under **Blackbaud CRM Integration service**, you view the number of records to update in Blackbaud CRM, and you can select to refresh them. You can also determine how often to run the integration process to send information to the Blackbaud CRM database.

Blackbaud CRM integration

Select how often to send information to **Blackbaud CRM**.

Number of records to update [342](#) on 6/1/2016 at 8:32 AM 

Frequency:

Never

500 records every (minutes)

records daily at : AM

Last run: 6/1/2016 8:28 AM (In web server's time zone)

 Completed successfully

1. Beside **Number of records to update**, the number of records to update in Blackbaud CRM appears as a hyperlink. When you select it, a screen appears that lists each record type that is updated by this process. The number of records to update for each type also appears, along with the type's last integration date.

To refresh the records to make sure the process integrates the latest data from Blackbaud Internet Solutions to Blackbaud CRM, click the **Refresh** icon. When the refresh completes, the date and time update to reflect the refresh.

2. Under **Frequency**, select how often to run the integration process to send information to the database.
 - To prevent the process from running, select **Never**.
 - To send information to the database at regular intervals, enter the number of records to process each time and enter the interval in minutes in the **[] records every [] (minutes)** fields.
 - To send information daily, enter the number of records to send during each process and enter the time in the **[] records daily at [][][]** fields.

Tip: If you are in a different time zone than your web server, select times based on your web server's time zone. The program does not use your organization's default time zone or the local time zone of the user who sets the schedule.

3. To save the settings, click **Save**.

> User import settings

1. Under **User imports**, select how often to run the process to import user information from the database.

User imports

Select how often **Blackbaud Internet Solutions** runs the process to import user information.

Frequency:

Never

Every (hours)

Daily at : PM

Last run: 2/6/2012 11:08 AM

 Completed successfully

- To not run the process, select **Never**.
- To import user information at regular intervals, select **Every [] (hours)** and enter the interval between instances of the process.
- To import user information once a day, select **Daily at** and select the time to run the process.

Tip: If you are in a different time zone than your web server, select times based on your web server's time zone. The program does not use your organization's default time zone or the local time zone of the user who sets the schedule.

2. To save the settings, click **Save**.

➤ Anonymous email subscriber matching

1. Under **Anonymous email subscriber matching**, select how often to run the process to match anonymous email subscribers with constituent records.

Anonymous email subscriber matching

Select how often to check for email address matches between anonymous email subscribers and constituents. If the email address of an email subscriber matches a constituent record, the communication preferences will be updated on the constituent record.

Frequency:

Never
 Every day(s) at :

Last run: 2/6/2012 11:08 AM
✔ Completed successfully

- To not run the process, select **Never**.
- To import user information at regular intervals, select **Every [] day(s) at (hour)** and select the time to run the process.

Tip: If you are in a different time zone than your web server, select times based on your web server's time zone. The program does not use your organization's default time zone or the local time zone of the user who sets the schedule.

2. To save the settings, click **Save**.

➤ Secure payment page template update

To help you comply with the Payment Card Industry Data Security Standard (PCI DSS), some parts use secure payment pages on a Blackbaud server to process credit card billing information and payment information. Use this setting to update your secure payment pages with the latest design and property changes you make for style sheets, layouts, templates, and pages. If you do not use this setting, the program holds your changes in a queue and pushes them to the secure payment page within one hour. For more information about secure payment pages, see the *Parts Guide*.

1. Under **Secure payment template update**, to manually update secure payment pages so they include the latest template changes for desktop browsers and mobile devices, click **Update templates**.

Secure payment template update

To help you comply with the Payment Card Industry Data Security Standard (PCI DSS), some parts use secure payment pages to process credit card transactions. To manually refresh the templates for these pages, click **Update templates**. Otherwise, the program automatically pushes updates at a regular interval. If you clear **Enable secure payment template updates**, secure payment pages use a generic template that does not match your website. [Learn more about secure payment pages.](#)

Update templates

Enable secure payment template updates

Update all Blackbaud secure payment pages to a responsive web page

Last run: 10/19/2015 7:41 AM (In web server's time zone)

Completed successfully

To upgrade all Blackbaud secure payment pages to responsive pages across all of your websites, select this checkbox and click **Update templates**. This begins the process to upgrade all static secure payment pages to responsive pages. Also, any recent changes to style sheets, layouts, templates, and pages push to the Blackbaud server to update all secure payment pages. To upgrade an individual Blackbaud secure payment page, from *Pages & templates*, open the page that includes the part that integrates with the secure payment page. Next, select the Blackbaud secure payment preview tab.

The update begins and the button disables. After it completes, the button enables again.

Note: You cannot select to update a secure payment page for a specific part. When you click **Update templates**, secure payment pages update for almost all applicable parts. However, the program does not send updates to the Blackbaud secure payment server for Advanced Donation Form, Event Registration Form, Membership Form, and Payment 2.0 pages that do not accept credit cards, and Transaction Manager pages that do not allow payment type changes for recurring gifts.

2. To replace your organization's template for the secure payment page with a generic template, clear **Enable secure payment template updates**. The **Update templates** button disables so you cannot apply your template to the page.

It is unlikely you want to use the generic template because it does not match the rest of your website. However, Flash, JavaScript, and externally hosted content does not upload to the secure payment page for PCI DSS compliance. If your page, template, or layout includes this content and the absence of it heavily impacts the appearance of your secure payment page, you may want to use the generic template. You can also use the generic template if you need to temporarily revert your template updates to the page. When you are ready to use your template again, select **Enable secure payment template updates** and click **Update templates**.

To upgrade an individual Blackbaud secure payment page, from *Pages & templates*, open the page that includes the part that integrates with the secure payment page. Next, select the Blackbaud secure payment preview tab. For more information, refer to the *Website Design Guide*.

3. To save the setting, click **Save**.

> Delete email permanently

In *Email*, when you select to delete an email message or newsletter issue, it removes from the user interface, but the data remains in the back end of the database. To improve performance and

permanently delete this email, schedule the options on this setting. If you do not want to delete these messages, select **Never** for both options.

Note: To prevent the possibility of anyone scheduling this setting, your System Administrator can use the ShowEmailDelete web.config setting to remove it from the Schedules tab. By default, the setting is `<add key="ShowEmailDelete" value="True"/>`. To remove it from the tab, enter False.

1. Under **Automatically delete email older than**, you can select to delete messages and newsletters based on whether the email is beyond a certain number of days, months, or years.

If you do not want to permanently delete these email based on age, select **Never**.

To delete email older than a certain age, select the second option. In the field beside it, enter the number of days, months, or years to delete email, and then select an option in the drop down. For example, to delete email older than two years, enter "2" in the field and select Years.

Note: When you use this setting, the program calculates the age based on the email sent date. The process then deletes the applicable email from *Email* before deleting it from the back end of the database. If you leave the default as **Never**, the program only removes email from the back end of the database.

2. Under **Business process frequency**, you select how often to run the business process.

If you do not want to permanently delete these messages, select **Never**.

To establish a frequency for the program to permanently delete email messages and newsletter issues, select **Every [] day(s) at []:[][]** and enter the number of days and time to run this delete process in the fields.

Delete email permanently

In *Email*, when you select to delete an email message or newsletter issue, it no longer appears in the user interface, but the data remains in the database. To improve performance and permanently delete these messages from the database, schedule the options for this setting. If you do not want to delete these messages, select **Never** for both options.

To run the process as efficiently as possible, we recommend you schedule this to run after hours when users are less likely to access **Blackbaud Internet Solutions** and **Blackbaud CRM**.

Automatically delete emails older than:

Never
 2 Years

Last run: 4/30/2015 2:15 PM (In web server's time zone)
 Completed successfully

Business process frequency:

Never
 Every 1 day(s) at 2:00 AM

Options:
 Do not allow for process to run more than 30 minutes

3. Under **Options**, enter the number of minutes to allow the process to run in the **Do not allow for process to run more than [] minutes** field.

Depending on the volume of email you need to permanently delete, the process can exceed the amount of time you enter in this field. When this occurs, the process pauses and starts again according to the interval you scheduled in the **Every [] day(s) at []:[][]** fields.

For example, you need to run this process for the first time. Due to the high volume of email to initially delete, you can schedule it to run every night (1 day) at 1 AM for 300 minutes (5 hours). The process runs longer than 300 minutes so it pauses until the next night at 1 AM. At that time, it starts again for the next 300 minutes.

If the process pauses according to your schedule and the number of minutes you allow it to process, **Did not finish** appears in the **Last run** information box on the right.

Note: To run the process as efficiently as possible, we recommend you schedule it to run after hours when users are less likely to access Blackbaud Internet Solutions and Blackbaud CRM.

Email Updates in Blackbaud CRM

To learn more about changes in Blackbaud CRM after you permanently delete email messages and newsletter issues, review this section.

- **Constituent Record** - Before you permanently delete email using this process, email messages and newsletter issues on a constituent record in Blackbaud CRM appear with a link beside the **Subject** field. You can click this link to open the message in Blackbaud Internet Solutions. After you run this process, the link disables beside the **Subject** field because you can no longer open it in Blackbaud Internet Solutions. Also, if a recipient opens an email after it has been deleted permanently, submits a donation from one, or clicks links in it, the **Opened**, **Donated**, and **Links clicked** fields do not update to reflect this information. The data that appeared in these fields when it was deleted from your database remains in place. For historical purposes, the other data, such as **Email name** and **Date sent**, also remain on the constituent record.

In Blackbaud CRM, email message and newsletter issue information displays on the Communications second-tier tab on the Communications tab. For more information about this tab, refer to the *Blackbaud CRM Constituents Guide*.

- **Appeal Record** - Blackbaud Internet Solutions email for an appeal appears in the **Blackbaud Internet Solutions emails** grid on the Mailings tab of an appeal record in Blackbaud CRM. After you run this process, the calculations for an email, such as response rate and the number of click throughs, no longer updates. However, the data at the time the email is permanently deleted remains in the grid.

For more information about the Mailings tab, refer to the *Blackbaud CRM Communications Guide*.

- **CMS Delete Email Business Process** - From *Administration, Business processes* in Blackbaud CRM, you can open the CMS Delete Email Business Process to view details about each instance of this process. To do this, on the Business Processes page, select the History tab. In the **Process type** field, select CMS Delete Email Business Process and click **Apply**. The processes appear in the grid below for you to view details such as the status of the process and the date and time the process ended. For more information about business processes, refer to the *Blackbaud CRM Queue and Business Processes Guide*.

Financial

Under **Financial**, establish settings for eReceipts.

➤ Donation eReceipts and currency settings

Under **Donation eReceipts**, set up a unique receipt stack for donations through your website. You can use eReceipts to include links to *.pdf files of donor receipts with acknowledgment emails. And under **Cross-currency payments**, select whether to let users change currencies when they pay their commitments.

1. In the **Receipt stack** field, enter a unique identifier such as "Online" for the receipt stack. When the program generates eReceipts, it includes the identifier as a prefix to receipt numbers. You can enter up to 60 characters.

Donation eReceipts

With eReceipts, you can include links to .pdf files of donor receipts in the acknowledgements that you send.

Receipt stack:

Initial receipt number:

Cross-currency payments

Allow users to make cross-currency payments

Enter a unique identifier such as "Online" to differentiate eReceipts from other receipts. The identifier appears as a prefix in the receipt number.

Enter a receipt number for your first eReceipt. Each subsequent receipt number increases this number by one.

Select this checkbox so website users can pay in a different currency from the currency of the commitment. Currency exchange rates are obtained from **Blackbaud Enterprise**.

Tip: The receipt stack you create in Blackbaud Internet Solutions is not associated with receipt stacks in Blackbaud CRM; it is an independent identifier. However, you cannot save a receipt stack in Blackbaud Internet Solutions that exists in Blackbaud CRM. The Blackbaud Internet Solutions receipt stack must be unique.

2. In the **Initial sequence number** field, enter the first available receipt number in the receipt stack for donations through the website.
3. To allow website users to pay pledges with a different currency than they specified in their original commitment, select **Allow users to make cross-currency payments**. For information about currency settings in **Blackbaud CRM**, see the *Multicurrency Guide*.
4. To save the settings, click **Save**.

Social Media

You can integrate your website with *Janrain*, a third-party authentication service to manage multiple logins for your Blackbaud Internet Solutions and social network websites, such as *Facebook* and *Twitter*.

When you configure this integration and users register on your website, they can select to create a unique login for your site or they can use existing login credentials from a social network website.

To allow website users to use existing social network logins, you must:

- Create a social media application so your website can integrate with the social media authentication service. Settings for the application are global. If you have more than one website, the application applies to all sites.
- On the *Janrain* website, configure the application and select the social networks to support on your login pages.
- On User Login parts, enable the social media login and select the display of the icons on login pages.

After you create and configure social media login, users view social network icons on login pages.

When a website user uses social network credentials to register for your website, the user is also logged into their social network account. Your registration page appears and the first name, last name, and email address automatically default in the fields on the page. When the user completes the page and submits the data, the program automatically creates a user record in Blackbaud Internet Solutions to store the first name, last name, email address, and a link to the user's social network page. The user record includes an automatically generated user name (SocialWeb_xxx) and password (Sweb_xxx), where xxx is a random generated number. The default role assigned to new registrants applies to the user.

Note: On the login page, social media registrants cannot use the Blackbaud Internet Solutions forgotten username and password functionality. Instead, users must access the social media site's forgotten password functionality to retrieve their credentials. Also, social media registrants cannot use a Blackbaud Internet Solutions profile update to update a social network profile. The changes must be made separately on the social network website.

After a website user registers for your website by using social network credentials, the program remembers the social network account so users can log in again the same way.

Sign in:

User ID:

Password:

Remember Login

Login

[New User Registration](#)

[Forgotten Password](#)

Or **Use your login from:**

Google™

not you?

Welcome back, kbellfleur

Sign In »

use another account

When a user logs out of your site, the connection to the social network remains active until the user signs out of the account from the social network site.

Create Social Media Application and Configure Janrain Settings

Create a social media application to enable the website to use the *Janrain* social media authentication and sharing service to integrate with social network providers such as *Google*. Website users can then use social network login credentials on your website login page.

When you host multiple sites and create a social media application, it applies to all sites. You must specify a domain for the application and provide the email address to use for communication with the authentication service. The *rpxnow.com* domain is available for you to use for your application or you can use your organization's domain. After you create the application, you receive an email from *Janrain*. The email contains a link for you to access your *Janrain* account and select the social networks to provide on your login pages.

Note: We recommend you use the *Janrain* help documentation for the most up to date *Janrain* procedures.

> Create social media application and configure Janrain settings

1. Under **Social media**, select **Create social media application**. Additional fields appear.
2. In the **Domain** field, enter the fully qualified domain for the social media application. For example, you might enter `signin.yoursite.com`. To qualify a domain, you must create a CNAME (canonical name) record and an A record (referred to as the @) to map to *Janrain's* domain and IP address. We recommend you contact *Janrain* for detailed configuration information.

Note: Blackbaud provides a standard preconfigured domain, *rpxnow*, that you can use for free. You may want to use this domain if your organization does not have its own domain configured with *Janrain*. To use the *rpxnow* domain, enter it in this format: `name.rpxnow.com`, where "name" is the name you want to assign to the social media application. For example, the domain for a Blackbaud Internet Solutions for ABC Organization may be "abcorganization.rpxnow.com."

Tip: Registering domain names and creating CNAMEs and A records requires advanced knowledge of the DNS (Domain Name System). If you do not have this knowledge or experience, contact the appropriate system administrator at your organization for assistance.

3. In the **Email** field, enter the email address to use for communication from the social media authentication service about your account.
4. Click **Create**. The application creates and you receive an email from the authentication service. The email provides a link to your *Janrain* account so you can configure it.
5. To save the settings, click **Save**.

Note: After you save the social media application, use **Clear Settings** with caution. When you clear settings, the **Domain** and **Email** fields remove, but the social media application does not delete from *Janrain*. If you create a new social media application, you cannot use the same domain again. To delete the *Janrain* account, you must do so on *Janrain's* website.

6. Open the email from *Janrain* and click the link to access your account. On the *Janrain* website, you identify website domains and select the social networks to display on Blackbaud Internet Solutions login pages. For information about *Janrain* settings, see *Janrain's* help file.

After you complete these steps in *Janrain*, you can enable the social media application on User Login parts. For more information, see [On a User Login part, enable social media login and select the display for social network icons on the login page. on page 50.](#)

➤ Update social media application configuration

After you configure a social media application, you can make changes as necessary. For example, you can disable the social media application. When you do this, social media disables for all sites, and website users cannot view social media icons on login pages.

1. Under **Social media**, the **Enable social media authentication** field is selected, and the **Domain** and **Email** fields are disabled. To remove the application, clear the checkbox.

Note: After you save the social media application, use **Clear Settings** with caution. When you clear settings, the **Domain** and **Email** fields remove, but the social media application does not delete from *Janrain*. If you create a new social media application, you cannot use the same domain again. To delete the *Janrain* account, you must do so on *Janrain's* website.

2. To adjust *Janrain* settings, click the link beside **To configure your application click here**. A page appears so you can sign in to the authentication service and configure the social media application with the login used when the application was originally created. For information about *Janrain* settings, see *Janrain's* help file.
3. To save the settings, click **Save**.

➤ Enable social website login on a User Login part

On a User Login part, enable social media login and select the display for social network icons on the login page.

1. In *Parts*, open the User Login part to enable social media on the login web page.

For information about how to create or edit a part, as well as the tabs on the Edit Part screen, see the *Parts Guide*.

2. On the Design tab, under **Social website login**, select **Enable social website login**. Additional options appear.
 - a. In the **Sign in text** field, enter the text to display for standard and social network login options.
 - b. In the **Social website sign in text** field, enter the text to display above the social site icons.
 - c. Under **Display options**, specify where to place the social site icons relative to the standard login fields.
3. Click **Save**. You return to *Parts*.

API

Under **API**, you can enter keys and other API information to allow Blackbaud Internet Solutions to access data from an external system such as websites and online applications.

> Single sign on

When you integrate your website with another site, it can use the single sign on private key so that users who are logged in to your site do not need to enter different logins when they access the external site through links on your Blackbaud Internet Solutions site. Users can click unique links from a Blackbaud Internet Solutions page to access secured non-Blackbaud Internet Solutions pages without entering user name and password information for the non-Blackbaud Internet Solutions pages.

1. Under **Single Sign On**, enter a private key that an external system can use to decrypt user IDs that it accesses through the GetUserID.ashx endpoint in the Blackbaud Internet Solutions API. The external system can use the user IDs so that users who are logged in to your site do not need to enter different logins to access the external site through links on your Blackbaud Internet Solutions site.

Single Sign On

Enter a private key that an external system can use to decrypt user IDs that it accesses through the GetUserID.ashx endpoint in the **Blackbaud NetCommunity** API. The external system can use the user IDs so that users who are logged in to your site do not need to enter different logins to access the external site through links on your **Blackbaud NetCommunity** site.

GetUserid.ashx private key:

To determine user IDs, the external system accesses the GetUserID.ashx endpoint with a return URL in the query string. The endpoint redirects website users to the return URL and uses several query string parameters to securely determine their user IDs.

2. To save the settings, click **Save**.

> LinkedIn

Note: Due to *LinkedIn* API changes, the LinkedIn Group Join part has been deprecated and no longer works on your website. If the part exists on any of your websites, we recommend you remove it as soon as possible.

Site Settings

When you host one website, site settings only apply to your default site. When you host multiple websites, you apply site settings to each default, parent, and child site.

- [General site settings on page 52](#)
- [Language settings on page 54](#)
- [Page settings on page 55](#)
- [Registration and login options settings on page 57](#)
- [User image options settings on page 58](#)
- [Site tracking settings on page 59](#)
- [reCAPTCHA settings on page 68](#)
- [Single sign-on authentication settings on page 69](#)

> General site settings

Under **General**, establish default, parent, or child settings for an individual website.

1. In the **Site name** field, enter a name for the site. In the **Parent site** field, select a parent site to inherit global settings.

General

Site name: *

Parent site:  

Time zone: ▼

 Favicon image (.ico):

Primary site URL: *

Alternate site URLs

If you register URLs that you want to redirect to your primary site, include them in the grid. For example, you can register URLs with typos and then add them so that users who mistype the primary URL still reach your site. [Learn more about alternate site URLs.](#)

Add URL:

www.example.com	✕
www.example.net	✕

- In the **Time zone** field, select your organization's default time zone. For example, if your organization is located in New York, select "New York (EST) GMT-5:00."

The time and dates the user sees on your site pages and email in the program use the time zone specified on the User Profile Form part. If the user does not specify a time zone on the User Profile Form part, the time zone selected in the **Time zone** field appears as the default. The program uses Coordinated Universal Time (UTC) as its time standard, and time zones are expressed as offsets from the UTC. This allows the program to retain time and date information and display it accurately in multiple time zones.

If you do not select a default time zone in the **Time zone** field, the program uses the date and time zone from the web server.

- In the **Favicon image (.ico)** field, click **Browse** and select an .ico image file. A favicon image is a small icon that represents your website and appears in browser address bars and locations where users save your website URL, such as browser favorite lists. We recommend you upload a 16x16 or 32x32 pixel image for maximum display quality. If you select an image with a different file type or size, or if the file does not convert correctly to .ico, the file may not render correctly in all browsers.

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

- In the **Primary site URL** field, enter the URL for a new site or change it for an existing site. You must enter the URL with a protocol such as "http://www.example.org". If a message appears that informs you it is not valid, check your Domain Name System (DNS) configuration.
- In the **Add URL** field, click **Add** to include URLs that you want to redirect to your primary site

URL. For example, you can include URLs with typos or an abbreviation for your organization so that users who mistype the primary URL still reach your site.

Note: When Blackbaud hosts your website and you need to add primary site URL redirects for a new Blackbaud Internet Solutions domain, contact Customer Support on Blackbaud's [website](#).

➤ **There are several important items to remember about alternate site URLs.**

- You must register the domain URLs with a registrar in order for the redirects to render your primary URL. If you do not, the redirects do not work.
- These URLs are 301 redirects that maintain search engine rankings for the primary site.
- You can enter the URL with or without a protocol, such as "http://".
- The program validates each URL to make sure it is unique in Blackbaud Internet Solutions. When you include a URL that already exists in the database, you cannot save it in the grid.
- It is important to remember the difference between these redirects and redirects you add in *Administration, URL redirects*. In this grid, you enter website redirects for the primary website URL. One redirect can reroute a group of URLs. For example, you add `http://yoursite.org` to redirect to the primary URL, `http://www.yoursite.org`. This redirects all `http://yoursite.org` URL requests, such as `http://yoursite.org/donate` and `http://yoursite.org/aboutus`, to the primary URL. In *URL redirects*, you add page URL redirects to reroute traffic to another page. For example, you add `http://yoursite.com/donate` to redirect to `http://www.yoursite.com/donate`. This only redirects the donation page. Be aware these page URL redirects override the redirects you add in this grid. For more information about page redirects, see [URL Redirects on page 86](#)

6. To save the settings, click **Save**.

➤ **Language settings**

1. Under **Supported languages**, select the languages to support on your website. For example, if your website audience includes Spanish and French-Canadian users, in the **Add languages** field, select **Español (Mexico)** and **français (Canada)**.

Supported Languages

Add Languages: ▼

English	[en]	
English (United States)	[en-US]	
English (Australia)	[en-AU]	✘
English (Canada)	[en-CA]	✘
English (New Zealand)	[en-NZ]	✘
English (United Kingdom)	[en-GB]	✘

Default language: ▼

In the **Default language** field, select the default language for the website. If a website visitor's browser has a country code that is not supported, the site renders in the default language.

Note: The languages you support appear in multiple areas of the program. Supported languages appear in the **Target language** field on a part's Properties tab. They appear in the **Language** field on the Language tab. They also appear in the **Language** field that appears on a web page when you use the Language Selector part.

After you select the languages to support, you can create international pages for your website. For more information, see the *Parts Guide*.

- Under **International**, you can select **Require postcode for UK addresses** to make the **Postcode** field required when a website donor selects United Kingdom in the **Country** field of a donation form.

International

Require Postcode for UK addresses

- To save the settings, click **Save**.

> Page settings

Under **Pages**, set up how the title bar of your web pages appears and select the default pages to appear for your website users, such as for your home page or when a login fails.

- Under **Site page titles**, select the text to appear in the title bar of the web pages.

Pages

Site page titles: Show organization name
 Show site name
 Show browser title

Home page:

Privacy page:

Error page:

Authorization failed page:

- To display your organization's name in the browser title bar, select **Show organization name**.
- To display the site name in the browser title bar, select **Show site name**.
- To display the title from the web page's properties in *Pages & templates*, select **Show browser title**. For more information, see the *Website Design Guide*.

Note: When you select all three options, your organization's name, site name, and page browser title all appear in the browser title bar. If you do not select an option, "Blackbaud Internet Solutions" appears.

2. In the **Authorization failed page** field, select the web page from *Pages & templates* to automatically appear when a user's attempt to log in fails.
3. In the **Home page** field, select the default web page from *Pages & templates* to automatically appear as your website's Home page.
4. In the **Privacy page** field, select the web page from *Pages & templates* that includes your organization's privacy statement. In each email you send, you must include a link to a page on your website that contains the privacy statement.

Note: The program requires that you enable cookies on your browser. As a best practice, we recommend you note this in your privacy statement, in addition to any security issues.

5. In the **Error page** field, select a web page from *Pages & templates* to appear if errors occur. For example, if there is an internal problem that generates a 500 error, users view the page you select instead of the generic one from the website's server.

The page can include a custom message with information to help identify the causes of errors. To provide error details in the message, use error merge fields in a Formatted Text and Images part. For information about the Formatted Text and Images part, see the *Parts Guide*. _

Note: The program includes default behavior that prevents unresolvable page link errors from appearing. In those instances, the program redirects users to the default site's home page. However, when users attempt to access unresolvable links to files, for example www.abc.org/file/123.pdf, the custom error page you select appears. For information about default sites, see [Select a default site on page 18](#).

6. To save the settings, click **Save**.

➤ Registration and login options settings

Under **Registration and login options**, set up how your website users register and log in. For example, you can set a minimum character length for passwords on your website and configure the program to temporarily lock an account after a set number of failed login attempts.

1. In the **Member login page** field, select the web page from *Pages & templates* to automatically appear as your website's login page.

Registration and Login Options

Member Login Page: ▼

Require complex passwords
*Complex passwords must be at least 8 characters in length and must contain one lowercase letter, one uppercase letter, and one numeric or special character, such as 1, 2, 3 or \$, #, %, *.*
Note: Users with supervisor rights must always use complex passwords.

Password Minimum Length: Passwords are case-sensitive

Lock Account After Attempts: *(enter zero for no limit)*

Account Lockout Duration: *Minute(s)*

Email Opt-in Setting

This setting determines whether new users opt in by default to receive email messages from your organization. To opt in users, select the checkbox. To require users to opt in, clear the checkbox and create a User Email Preferences Form part to allow them to subscribe to email messages. The email opt-in setting does not apply to notifications or acknowledgements, which all users receive.

Opt in new users to receive email messages

To opt in users by default, select this checkbox. To require users to opt in before they can receive email messages, clear the checkbox.

Warning: When you have multiple websites, make sure you select the login page for the same site as this setting. For example, you select **Registration and login options** for Site B. In the **Member login page** field, make sure you select the login page for Site B. If you select the login page for Site A, users do not have access to Site B.

2. Select **Require complex passwords** to apply additional password security. A complex password must contain at least eight characters, including one upper-case and one lower-case letter, and either a special character or a number.

When you select **Require complex passwords**, the **Password minimum length** field and **Passwords are case-sensitive** checkbox are disabled.

Note: Users with Supervisor rights must always enter a complex password.

Note: To help you comply with the Payment Card Industry Data Security Standard (PCI DSS), users with Supervisor rights must change their passwords at least every 90 days. Supervisor users are logged out of the program automatically when it is idle for more than 15 minutes. To avoid this, select the **Remember me** checkbox when you log in to the program. In addition, new passwords cannot match one of the last four passwords entered by the user.

3. In the **Password minimum length** field, enter the minimum number of characters to allow for passwords. To not require a password and allow users to register and log in with only a user name, enter "0."

Note: If you enter "0" in the **Password minimum length** field, when you click **Save**, the field's background color changes to red. This visual reminder indicates that users do not need to enter a password to access your website.

4. To make passwords case-sensitive, select **Passwords are case-sensitive**. This checkbox applies only to new members.
5. In the **Lock account after attempts** field, enter the number of attempts to allow the user to log in correctly. For example, to lock an account after three failed attempts, enter "3."
To keep an account available regardless of the number of failed attempts, enter "0."

Note: You can unlock a user's account in *Users & Security*. For more information, see the *Users & Security Guide*.

6. In the **Account lockout duration** field, enter how long, in minutes, the program should lock an account after its user reaches the failed login attempt limit.
To keep an account available regardless of the number of failed attempts, enter "0."
7. Under **Email opt-in**, select **Opt in new users to receive email messages** to set a default for new users to accept email messages from your organization. You can place a User Email Preferences Form part on your website to allow users to change the default. This setting does not affect notifications or acknowledgements.

Note: In some cases, legal restrictions may prohibit you from sending email messages to users by default. To require website users to opt in to receive email messages, clear **Opt in new users to receive email messages** and create a Communication Preferences form for users to subscribe to email messages. For information about the Communication Preferences form, see the *Forms Guide*.

Note: When you import offline users, the email setting associated with those users overwrites the online default setting.

8. To save the settings, click **Save**.

➤ User image options settings

Under **User image options**, configure the settings of the *Image library* the website user accesses. For example, you can select whether to require approval for images your users upload to the website and set a maximum file size for user images.

1. To require approval of all images that the user uploads to *Image library*, select **Require approval for all images uploaded by users**. By default, this checkbox is selected.

User image options

Require approval for all images uploaded by users

Maximum number of images allowed per user: (enter zero for no limit)

Maximum image size: KB (enter zero for no limit)

Default image folder: 

Default profile image folder: 

Note: When you select **Require approval for all images uploaded by users**, the program saves images that the website user uploads as unapproved. Until an Administrator approves an image, it appears only for the user who loads it. To other users, an unapproved image appears as the standard “Photo Not Available” graphic.

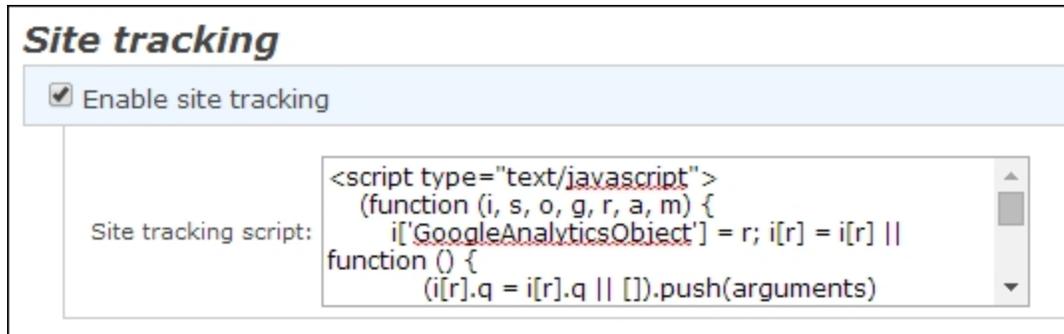
2. In the **Maximum number of images allowed per user** field, enter the maximum number of personal images a website user can upload to *Image library*. Users upload personal images on the User Photos Form part. You can view these in *Image library* by selecting “Personal” in the **Type of image** field on the Search tab.
To allow website users to upload an unlimited number of images, enter “0.”
3. In the **Maximum image size** field, enter the maximum file size in kilobytes for images that website users upload to *Image library*.
To use the default file size limit of 4 megabytes from the web.config file, enter “0.” To upload files larger than 4 MB, you must edit the web.config file.
4. In the **Default image folder** field, select the default folder images upload to in *Image library*.
5. In the **Default profile image folder** field, select the default folder profile images upload to in *Image library*. A website user uploads a profile image on their profile page. You can view these in *Image library* by selecting “Profile” in the **Type of image** field on the Search tab.
For information about *Image library*, see the *Website Design Guide*.
6. To save the settings, click **Save**.

➤ Site tracking settings

Google *Universal Analytics* is a service that generates detailed statistics about a website's traffic and measures conversions. When you sign up for an account with the service, you create a property for the website you want to monitor and receive a script for the service to track the website's performance. In Blackbaud Internet Solutions, you enable site tracking and enter the script. The program automatically adds the script you enter to each page of your website.

1. To set up your website for traffic measurement, select **Enable site tracking**.

2. In the **Site tracking script** box, enter the script from Google *Universal Analytics* to track traffic on your website. To provide a more informative URL to capture traffic measurements on web pages, enter the variable `BBNCAalyticsURL` in the script.



Note: For procedures and recommendations about how to configure visitor tracking, goals, and E-Commerce for Google *Universal Analytics*, refer to [Configure Blackbaud Internet Solutions for Google Universal Analytics on page 60](#).

When you enable site tracking on your website, the program generates URL information that Google *Universal Analytics* uses to identify your web pages. These URLs are associated with your web page URLs and passed through the back end to Google *Universal Analytics*.

Note: Parts that contain multiple steps generate additional URL information so you can track website users as they navigate through the steps. For information about these URLs, see [Site Tracking URL Information for Google Universal Analytics Goals on page 62](#).

3. To save the settings, click **Save**.

Configure Blackbaud Internet Solutions for Google Universal Analytics

When you sign up for an account with Google *Universal Analytics*, you create a property for the website you want to monitor and receive a script for the service to track the website's performance. To use the service with Blackbaud Internet Solutions, enable site tracking for each site you host and provide the script from the service. The program automatically adds the script you enter to each page of your website.

Note: If you host multiple websites, you can create a property for each because you enable site tracking for them separately.

This section provides information to help you configure site search tracking, goals, and E-commerce with Google *Universal Analytics*. Although the program supports the previous Google *Analytics* version of the service, we recommend you upgrade to *Universal Analytics* to use the latest features. For information about how to upgrade to *Universal Analytics*, refer to [Google Universal Analytics](#).

➤ Configure visitor tracking for Google Universal Analytics

If you use Google *Universal Analytics* reports to track website user behavior such as search patterns, you can add code to the script you receive from Google *Universal Analytics* to monitor whether users

are logged into the website or visiting when they perform searches. Add the code to the script you entered when you enabled tracking in Blackbaud Internet Solutions so the program includes the additional tracking requirements on each page of your website.

Note: Search metrics are pulled from the Search and Quick Search parts in Blackbaud Internet Solutions.

1. From your Google *Universal Analytics* account, create a custom dimension to track logged in users for the property that corresponds to your Blackbaud Internet Solutions website. A custom dimension is a way to send custom data to Google *Universal Analytics* so you can view the information in reports. For detailed information about custom dimensions, refer to the Google *Universal Analytics* help documentation.
2. Open Blackbaud Internet Solutions. On the Administration page, select **Sites & settings**.
3. Select the site to configure and then select the Settings tab.
4. In the **Site Tracking Script** box, add this section of code to the Google *Universal Analytics* script you entered when you enabled site tracking for the website. Add the code below the information in the field before `</script>`. For information about how to enable site tracking, see [Site tracking settings on page 59](#).

Note: When you enter the code, use the name you entered for your custom dimension for `<replace with custom dimension name>`.

```
if (LOGGEDIN) {
    ga('set', '<replace with custom dimension name>', LOGGEDIN);
} else {
    ga('set', '<replace with custom dimension name>', 'Visitor');
}
```

The combined script should look similar to the one below. Your version should include the account ID provided by Google *Universal Analytics* in place of UA-XXXXXXXX-Y. Also, if you are testing your website locally, replace `ga('create', 'UA-XXXXXX-Y', 'auto');` with `ga('create', 'UA-XXXXXX-Y', {'cookieDomain': 'none'});`

```
<script type="text/javascript">
    (function (i, s, o, g, r, a, m) {
        i['GoogleAnalyticsObject'] = r; i[r] = i[r] || function () {
            (i[r].q = i[r].q || []).push(arguments)
        }, i[r].l = 1 * new Date(); a = s.createElement(o),
        m = s.getElementsByTagName(o)[0]; a.async = 1; a.src = g;
        m.parentNode.insertBefore(a, m)

        })(window, document, 'script', '//www.google-
analytics.com/analytics.js', 'ga');
```

```
ga('create', 'UA-XXXXXXXX-Y', 'auto');
ga('send', 'pageview');
if (LOGGEDIN) {
    ga('set', '<replace with custom dimension name>', LOGGEDIN);
} else {
    ga('set', '<replace with custom dimension name>', 'Visitor');
}
</script>
```

5. To save the settings, click **Save**.

Site Tracking URL Information for Google Universal Analytics Goals

To use certain types of Google *Universal Analytics* conversion tracking tools such as destination goals and funnels, you must enter URL information from Blackbaud Internet Solutions when you configure them. The program generates these URLs when you enable site tracking on your website and passes them through the back end to Google *Universal Analytics*. The site tracking URLs include the website URL and page name. For example, `http://www.yourdomain.org/Page.aspx&part_[part ID]&pagename&pid=[page ID]`.

The following information provides the URL information for parts that contain multiple steps a website user navigates through on your website. For example, the Donation Form part may generate `http://www.yourdomain.org/Page.aspx&DonationStep_[part ID]=DonationStep_Acknowledgement&pagename=My+Donation+Form&pid=[page ID]`.

Note: For information about how to configure conversion tracking tools, refer to the Google *Universal Analytics* help documentation.

- **Donation Form:** Generates an associated URL that contains "DonationStep_Checkout" or "DonationStep_Acknowledgement." A URL that contains "DonationStep_Acknowledgement" indicates a completed donation. If your website contains multiple Donation Form parts, you can identify an individual part when "DonationStep_[part ID]" appears before the part step information in the URL. For example, "DonationStep_[part ID]=DonationStep_Acknowledgement."

Note: To use the examples in this section, replace "[part ID]" and "[page ID]" with the actual number for the part ID and page ID. To obtain a part ID, open the part. On the Properties tab, the ID appears in the **Part ID** field. To obtain a page ID, select the page in *Pages & templates*. On the Properties tab, the ID appears in the **Page ID** row.

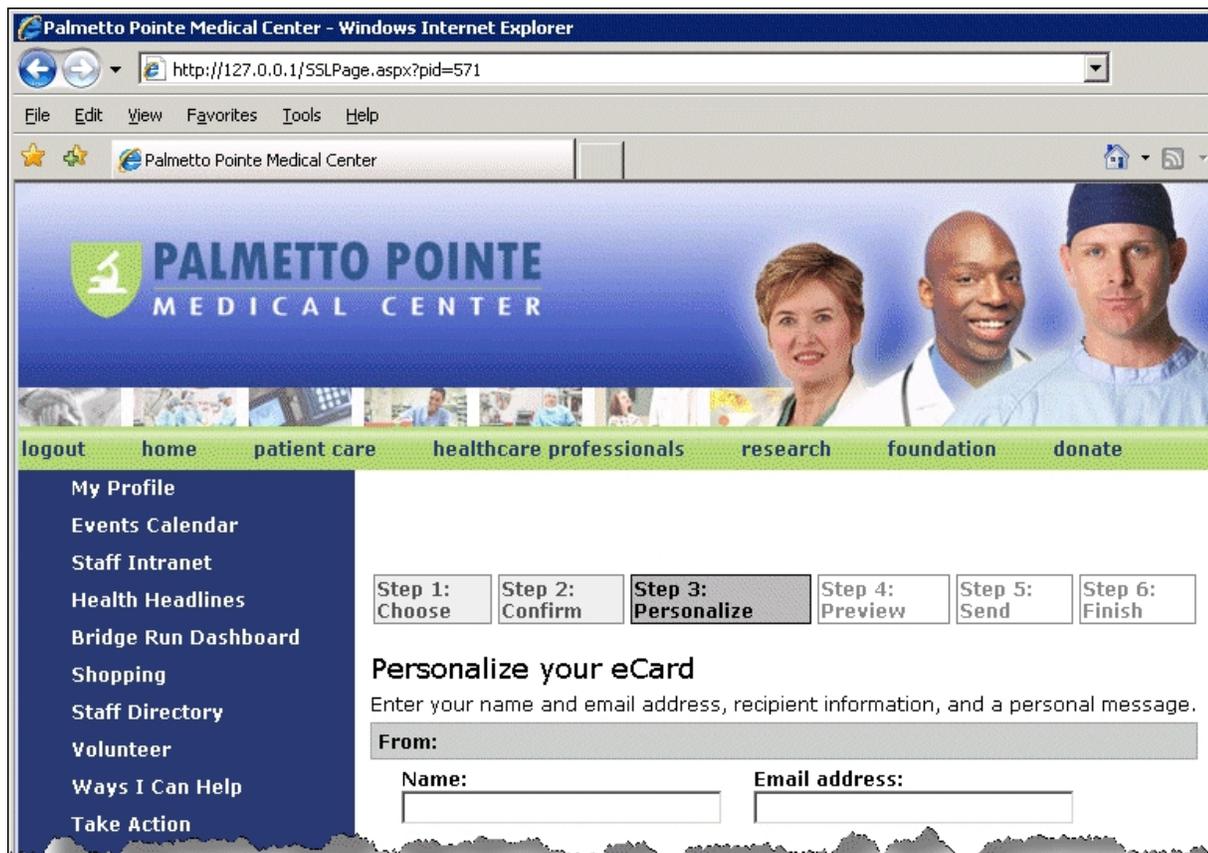
Associated URL example for a donation web page:

```
http://www.yourdomain.org/Page.aspx&DonationStep_[part ID]=DonationStep_
Checkout&pagename=My+Donation+Form&pid=[page ID]
```

The screenshot shows a web browser window titled "Palmetto Pointe Medical Center - Windows Internet Explorer". The address bar contains "http://127.0.0.1/SSLPage.aspx?pid=573". The browser menu includes File, Edit, View, Favorites, Tools, and Help. The website header features the Palmetto Pointe Medical Center logo and a banner with three healthcare professionals. A navigation bar includes links for logout, home, patient care, healthcare professionals, research, foundation, and donate. A left sidebar lists various services like My Profile, Events Calendar, Staff Intranet, Health Headlines, Bridge Run Dashboard, Shopping, Staff Directory, Volunteer, Ways I Can Help, Take Action, and Current Alerts. The main content area is titled "Palmetto Pointe Employee Giving" and includes a description of the program, a "Donation Information" section with an "Amount" field set to \$50.00, and an "Additional Information" section with a "Frequency" dropdown set to "One time". A "Continue" button is located at the bottom right of the form area.

- **eCard:** Generates an associated URL that contains "pnlStepConfirm," "pnlStepPersonalize," "pnlStepPreview," "pnlStepCaptcha," "pnlStepFinish," or "pnlStepDonation." A URL that contains "pnlStepDonation" indicates a completed eCard. If your website contains multiple eCard parts, you can identify an individual part when "eCardStep_[part ID]" appears before the part step information in the URL. For example, "eCardStep_[part ID]=pnlStepPreview."

Associated URL for an eCard web page: `http://www.yourdomain.org/Page.aspx&eCardStep=[part ID]=pnlStepPersonalize&pagename=eCards&pid=[page ID]`



- **Event Registration Form:** Generates an associated URL that contains "Event," "Prices," "Attendees," "RegisterNow," or "Acknowledgement." A URL that contains "Acknowledgement" indicates a completed event registration. If your website contains multiple Event Registration Form parts, you can identify an individual part when "EventStep_[part ID]" appears before the part step information in the URL. For example, "EventStep_[part ID]=Prices."

Associated URL for an event registration web page:

`http://www.yourdomain.org/Page.aspx&EventStep_[part ID]
=Attendees&pagename=Event+Registration&pid=[page ID]`

The screenshot shows a web browser window displaying the Palmetto Pointe Medical Center website. The browser title is "Palmetto Pointe Medical Center - Windows Internet Explorer" and the address bar shows "http://127.0.0.1/SSLPage.aspx?pid=487". The website header features the Palmetto Pointe Medical Center logo and a navigation menu with links: logout, home, patient care, healthcare professionals, research, foundation, and donate. A sidebar on the left contains links for My Profile, Events Calendar, Staff Intranet, Health Headlines, Bridge Run Dashboard, Shopping, Staff Directory, Volunteer, Ways I Can Help, Take Action, and Current Alerts. The main content area displays a cart for "Afternoon Tea" with the following items:

Qty	Selection	Attendees	Price	Total
2	Adult	1	\$75.00	\$150.00
1	Child	1	\$50.00	\$50.00
				\$200.00

Below the cart, there is a form for adding attendees to the "Afternoon Tea" event. The form includes a dropdown menu for "Attendee" (set to "New individual"), text input fields for "Name" and "Email", and a dropdown for "Address" (set to "Unknown").

➤ Configure E-Commerce tracking for Google Universal Analytics

If you use Google *Universal Analytics* reports to track E-Commerce conversions, you must configure Blackbaud Internet Solutions to provide the service with purchase information. You can track and report on revenue transactions made on pages that contain these part types: Donation Form, Event Registration Form, and Payment 2.0. If you have the eStore customization, you can also track transactions on pages with the eStore Storefront part.

First you add code to the script you receive from Google *Universal Analytics* to monitor whether users complete E-Commerce purchases. Add the code to the script you entered when you enabled tracking in Blackbaud Internet Solutions so the program includes the additional tracking requirements on each page of your website. Next, use an Unformatted Text part to add another script to pages that include transaction part types. The additional script is necessary because transactions are processed separately from the website by a secure payment processing service. The script receives transaction information from the processing service during the confirmation step and forwards the purchase details to Google *Universal Analytics*.

1. Open Blackbaud Internet Solutions. On the Administration page, select **Sites & settings**.
2. Select the site to configure and then select the Settings tab.

3. In the **Site Tracking Script** box, add this section of code to the Google *Universal Analytics* script you entered when you enabled site tracking for the website. Add the code below the information in the field before `</script>`. For information about how to enable site tracking, see [Site tracking settings on page 59](#).

```
ga('require', 'ecommerce');
```

The combined script should look similar to the one below. Your version should include the account ID provided by Google *Universal Analytics* in place of UA-XXXXXXXX-Y. Also, if you are testing your website locally, replace `ga('create', 'UA-XXXXXX-Y', 'auto');` with `ga('create', 'UA-XXXXXX-Y', {'cookieDomain': 'none'});`.

```
<script type="text/javascript">
    (function (i, s, o, g, r, a, m) {
        i['GoogleAnalyticsObject'] = r; i[r] = i[r] || function () {
            (i[r].q = i[r].q || []).push(arguments)
        }, i[r].l = 1 * new Date(); a = s.createElement(o),
        m = s.getElementsByTagName(o)[0]; a.async = 1; a.src = g;
m.parentNode.insertBefore(a, m)

        })(window, document, 'script', '//www.google-
analytics.com/analytics.js', 'ga');

        ga('create', 'UA-XXXXXXXX-Y', 'auto');
        ga('send', 'pageview');
        ga('require', 'ecommerce');
    </script>
```

4. Open Blackbaud Internet Solutions. From *Parts*, create a new Unformatted Text part. For information about how to create an Unformatted Text part, refer to the *Parts Guide*.
5. In the box, enter the script below and then click **Save**.

```
<script type="text/javascript">
    BLACKBAUD.netcommunity.api.DonationConfirmation.add(function
(data) {
        if (data.TransTotal) {
            ga('ecommerce:addTransaction', {
                'id': data.TransID,
                'affiliation': '',
                'revenue': data.TransTotal,
                'shipping': '',
```

```

        'tax': ''
    });
    for (var i = 0; i < data.Items.length; i++) {
        ga('ecommerce:addItem', {
            'id': data.Items[i].ID,
            'name': data.Items[i].Name,
            'sku': data.Items[i].SKU,
            'category': data.Items[i].Name,
            'price': data.Items[i].Price,
            'quantity': data.Items[i].Quantity
        });
    }
    ga('ecommerce:send');
    ga('ecommerce:clear');
}
});
</script>

```

Warning: This code applies to standard Blackbaud Internet Solutions transactions. If your site processes custom transaction data, please contact Blackbaud Professional Services or a developer who is familiar with the Google Universal Analytics API to configure the E-Commerce code. This code is also provided as an example from Google *Universal Analytics* and may not be the most recent version. To ensure that you have the correct code, refer to [Google Universal Analytics](#).

6. Select **Show advanced options**.
7. In the **Placement in HTML** field, select "At the end of the <body> tag."
8. Place the Unformatted Text part on any page that includes one of these part types: Donation Form, Event Registration Form, and Payment 2.0. The script you entered in the Unformatted Text part sends tracking information to Google *Universal Analytics* about transactions made on those pages. The tracking information includes:

Data ID in Google Analytics	Description of data type
--------------------------------	--------------------------

data.TransTotal	Total dollar amount for the transaction.
-----------------	--

Data ID in Google Analytics Description of data type

data.TransID	Identifies the transaction.
data.Items	Items included in the transaction. If the transaction contains multiple items (for example, a transaction from a Payment 2.0 part may include several purchased items), the items are identified as data.Item[0], data.Item[1], data.Item[2], etc.
data.Items.ID:	Associates an item with a transaction. This is the same value as the TransID.
data.Items.SKU	Unique SKU used to track the price and quantity of an item.
data.Items.Name	Human readable name for an item.
data.Items.Price	Price of an item.
data.Items.Quantity	Number of items purchased of the same type.

> reCAPTCHA settings

To help prevent automated abuse of your website, the program uses a completely automated public turing test to tell computers and humans apart (CAPTCHA). With CAPTCHA functionality, the program can ensure a user is not an automated program to generate spam or phish for payment information. To verify the website user is a person, the website program displays a checkbox labeled "I'm not a robot." To send an email message through the website, such as through an eCards part, the user must click the checkbox. Under **reCAPTCHA**, you can select whether to also use CAPTCHA on all parts that process credit card or direct debit payments, such as the Donation Form and Event Registration Form parts.

Note: In cases where the program cannot confidently predict whether a user is a human or an abusive agent, it will display an additional test to confirm the user is valid. For example, the CAPTCHA may display multiple images and ask the user to identify which images match a particular description.

1. Under **reCAPTCHA**, enter the public and private keys you receive when you sign up for *reCAPTCHA*. The program uses this information to access your installation of *reCAPTCHA*. For additional security, the program masks the entry in the **Private key** field.

reCAPTCHA

Public key: [What is reCAPTCHA?](#)

Private key:

Usage:

- Non-donation eCards
- Anonymous and provisional users when processing a payment
- Non-provisional authenticated users when processing a payment
- New user registrations

reCAPTCHA provides free CAPTCHA functionality for your website. For accessibility, *reCAPTCHA* also provides an audio CAPTCHA for visually impaired website users. To use CAPTCHA functionality on your website, you must install *reCAPTCHA* and configure the installation. To obtain **reCAPTCHA**, go to <http://www.google.com/recaptcha>. When you sign up for *reCAPTCHA*, you receive the public and private keys.

2. Select where to use *reCAPTCHA* on your website.
 - By default, the program selects **Non-donation eCards**. You cannot clear this option because these parts leave your website vulnerable to automated abuse without CAPTCHA. If you create eCard parts before you install *reCAPTCHA* and enter the private and public keys, a warning message appears.
 - To use CAPTCHA on parts that process payments for users who did not log in to your website and users who log in but are not yet linked to constituent records in your database, select **Anonymous and provisional users when processing a payment**.
 - To use CAPTCHA on parts that process payments for users who log in to your website and are linked to constituent records in your database, select **Non-provisional authenticated users when processing a payment**.
 - To use CAPTCHA on the new user registration form, select **New user registrations**.

Note: The *reCAPTCHA* usage options you select control all Blackbaud Internet Solutions parts except those using the Blackbaud Secure Payments form, which is controlled by the settings on each applicable part.

3. To save the settings, click **Save**.

➤ Single sign-on authentication settings

If your website contains web pages that integrate with software programs other than Blackbaud Internet Solutions, you can use single sign-on so users do not have to enter different logins on the Blackbaud Internet Solutions pages. With incoming single sign-on, users click a unique link from a non-Blackbaud Internet Solutions page to access Blackbaud Internet Solutions secured pages without entering user name and password information. Under **Enable single sign-on authentication**, select whether to enable single sign-on authentication to allow users transparent access to secured pages. When you do this, single sign-on systems for non-Blackbaud Internet Solutions pages authenticate users with a shared key and time algorithm in a querystring, such as `&u=Supervisor&t=151256232434&m=282FE2ECF98F5FFEDAAB12A38F3A3D54`.

1. To enable single sign-on for your website, select **Enable single sign-on authentication**. When you select this checkbox, the grid enables.

Note: Integration of your website with a third-party single sign-on system requires additional custom programming. For information about the code necessary to integrate with a single sign-on system, consult your single sign-on system provider.

Single Sign-on Authentication

Enable Single Sign-on Authentication

To add an SSO entry enter the data in the row above and click "Add New" at the bottom right.

	Description	Shared Key	UserName Querystring	Time Querystring	MD5 Hash Querystring	Expiration (seconds)	Include IP	Require SSL	
Edit	Default	5CCCE206-5609-448	u	t	m	300	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
	<input type="text"/>	<input type="checkbox"/>	<input type="checkbox"/>	Add New					

2. In the grid, enter the information to use with the single sign-on system.

Warning: With incoming single sign-on, users can log in to a non-Blackbaud Internet Solutions page and gain access to a Blackbaud Internet Solutions page but they cannot log in to a Blackbaud Internet Solutions page and gain access to a non-Blackbaud Internet Solutions page. To set up outgoing single sign-on to allow users to navigate from Blackbaud Internet Solutions to a third-party site without entering their credentials for the third-party site, see [API on page 51](#).

- a. Under **Description**, enter a unique name to identify the single sign-on instance.
- b. Under **Shared key**, enter a string value key used by the single sign-on system to access your website. We recommend a combination of letters and numbers.
- c. The Querystring columns contain the three variable parameters that other single sign-on systems pass via the URL.

Under **UserName querystring** enter the plain text variable that identifies the user name in the querystring generated by the single sign-on system.

Under **Time querystring** enter the variable that indicates the timestamp in the querystring generated by the single sign-on system. The timestamp is in epochtime when the URL was created. Epochtime is the number of seconds since January 1, 1970.

Under **MD5 hash querystring** enter the variable that indicates the MD5 hash value in the query string generated by the single sign-on system.

Note: The single sign-on system uses this information to generate a message digest (MD5) algorithm hash value in a querystring for security. If you select **Include IP**, the MD5 hash value has a format of "shared key + user name + client IP + time," where the client IP is the IP address of the website user. If you do not select **Include IP**, the MD5 hash value has a format of "shared key + user name + time."

- d. In the **Expiration (seconds)** column, enter for how long after the timestamp generated in the querystring the user has transparent access to the web page. By default, the single sign-on authentication expires after 300 seconds (5 minutes).
- e. If the single sign-on system uses the client IP address as additional security, select the checkbox in the **Include IP** column. This optional feature provides additional security by ensuring that the single sign-on link is only valid for a specific user's IP address.
- f. To require encryption such as Secure Sockets Layer (SSL) or Transport Layer Security (TLS) for additional security, select the checkbox in the **Require encryption** column. When you select this, pages require URLs that begin with "https."

- g. If you maintain multiple third-party web pages on your site, click **Add New** to add additional single sign-on entries. For security purposes, we recommend a separate entry for each third-party integration.
3. To edit an existing single sign-on entry, click **Edit** and update the information as necessary.
4. To delete an existing single sign-on entry, click **Delete**. At the message to confirm the deletion of the row, click **Yes**.
5. To save the settings, click **Save**.

Workflows

In *Workflows*, you create and manage the content approval workflows for Formatted Text and Images and Formatted Text and Images (Secured) parts on your website. With a workflow, users in specific roles must approve the content of a part before it appears on your website. When you create a workflow, you select whether it is the default workflow for the selected part type and designate users who can approve content. To access *Workflows*, from *Administration*, click **Workflows**.

Note: When you design a Formatted Text and Images or Formatted Text and Images (Secured) part, you select its workflow on the Content Approval tab. On the Content Approval tab, you also select the approval status for the part: "Draft" or "Ready for Approval." To display the content on your website, users with approval rights can select an approval status of "Publish." For more information about the Content Approval tab, see the *Parts Guide*.

> Create a workflow

When you create a workflow, you assign approval rights to users by role. Before you create a workflow, you must associate roles and task rights in *Security assignments* for users to approve content. For example, you can assign users to approval roles based on the type on the content of the parts they review. You can also select whether a role has all workflow related rights or only limited rights. For more information, see the *Users & Security Guide*.

1. From *Administration*, click **Workflows**. *Workflows* appears.
2. Click **New workflow**. The New Workflow screen appears.

New Workflow

Properties Notifications

Name: *

Description:

Part Type: Formatted Text and Images

Default for this Part Type:

Approval Roles:

Role	Can Approve
Members	<input type="checkbox"/>
Content Authors	<input type="checkbox"/>
Everyone	<input type="checkbox"/>
Content Authors	<input type="checkbox"/>
Participant	<input type="checkbox"/>
Site Administrators	<input type="checkbox"/>

3. In the **Name** field, enter a unique name for your workflow so users with rights to manage workflows can quickly identify the workflow in *Workflows* and when they create Formatted Text and Images parts.
4. In the **Description** box, enter more information to help identify the workflow, such as an explanation of when to apply this workflow to a part.
5. In the **Part Type** field, select whether the workflow applies to a Formatted Text and Images part or a Formatted Text and Images (Secured) part.
6. To make the workflow the default for the selected part type, select **Default for this Part Type**. When you select this checkbox, the workflow appears with an asterisk (*) when users select the workflow for parts of the type selected in the **Part Type** field.
7. In the **Approval Roles** grid, assign Can Approve security rights for each role. To designate the approval role to a user's role, select its checkbox.
8. Click **Save**. You return to *Workflows*.

Note: After you save a new workflow, we recommend you assign its part approval notifications. Part approval notifications alert the users who create or approve a part that uses the workflow when the approval status changes. To assign notifications to a workflow, you can edit the workflow or notification. For more information about notifications, see the *Email Guide*.

> Edit a workflow

1. From *Administration*, click **Workflows**. *Workflows* appears.

Workflows

[New workflow](#) [Help](#)

Create, edit, and delete Workflows that provide support for content approval on your website.

Filter by Name:

Action	Name	Description	Is Default	Part Type
	Default for FT&I	This is the default workflow for non-secured formatted text and image parts.	Yes	Formatted Text and Images

- In the **Filter by Name** field, enter the complete or partial name of the workflow to edit.
- Click **Filter**. The grid displays all workflows that meet the name criteria entered.
- Under **Action**, click **Click here to edit this workflow**. The workflow appears.
- To adjust the properties of the workflow, select the Properties tab. On this tab, adjust the name or description of the workflow, its selected part type, whether it's the default for the selected part type, and the users designated as the approval role.

Workflow: Default for FT&I

Properties Notifications Approvals

Name: *

Description:

Part Type:

Default for this Part Type:

Approval Roles:

Role	Can Approve
Members	<input type="checkbox"/>
Content Authors	<input type="checkbox"/>
Everyone	<input type="checkbox"/>
Content Authors	<input checked="" type="checkbox"/>
Participant	<input type="checkbox"/>
Site Administrators	<input type="checkbox"/>

- To view or manage the notifications used with the workflow, select the Notifications tab. On the tab, the grid displays the part approval notifications in your database.

Workflow: Default for FT&I

Properties Notifications Approvals

Create New Notification...

Display Name	Active for this Workflow	Action
Part Approval - Rejected Notification	<input checked="" type="checkbox"/>	Edit
Part Approval - Ready for Approval Notification	<input checked="" type="checkbox"/>	Edit
Part Approval - Published Notification	<input checked="" type="checkbox"/>	Edit

In the grid, the **Active for this Workflow** column indicates whether the workflow uses a notification. To edit a notification, such as to apply it to the workflow, click **Edit**. The notification appears. Under **Workflows**, select the workflows that use the notification. To return to the workflow, click **Save**.

To add a notification to the database, such as to create it for the workflow, click **Create New Notification**. The Select Notification Type screen appears so you can select the type of notification to create.

Warning: To create notifications for a workflow in Mozilla *Firefox*, you must first disable the pop-up window block. In *Firefox*, select **Tools, Options** from the menu bar. On the Options screen, select the Content tab and click **Exceptions** next to the **Block pop-up windows** checkbox. On the Allowed Sites screen, enter the addresses of the websites to allow pop-up windows and click **Close**. To return to the Notifications tab, click **OK**.

To customize the notifications based on the part and its approval status, add merge fields. To display the list of available merge fields, click **Merge fields** on the Insert tab in the toolbar. To expand the list, click the plus sign next to **General**. For information about the merge fields that appear when you design a notification for a workflow, see [Part Approval Notification Merge Fields on page 76](#).

For information about how to edit and create notifications, see the Notifications section of the *Email Guide*.

- To view the parts that are under construction or require approval in the workflow, select the Approvals tab. On this tab, the grid displays all parts that use the workflow and are not yet published on the website. In the grid, view the name, approval status, and most recent update activity of each part. For information about the approval status, see [Workflow Approval Status on page 75](#).

Properties Notifications Approvals

Action	Title	Status	Status Updated On	Status Updated By
<input checked="" type="checkbox"/>	Sample secured	Draft	12/12/2009 10:08:58 AM	Supervisor

1 versions meet selected criteria

- To adjust the approval status of a part, such as to approve and publish its content on your website, click **Click here to set the approval status for this version** in the **Action** column. The part appears and opens to the Content Approval tab.

For information about how to adjust the approval status from the Content Approval tab, see the *Parts Guide*.

- To send an email message to the person who most recently updated the approval status of the part, such as to discuss a Pending part with its author before you approve the content, click **Click here to send email** in the **Status Updated By** column.

Note: You can also view the parts that are under construction or require approval in a workflow from *Approvals*. In *Approvals*, you can view all draft and pending parts for all workflows or for a specific workflow. You can also access a draft or pending part, such as to adjust its approval status. For more information about *Approvals*, see the *Approvals* chapter of the *Website Design Guide*.

8. Click **Save**. You return to *Workflows*.

Workflow Approval Status

Workflows provide an approval process for the parts program users create for your website. With a workflow, users in the approval role must review and approve the content on all new and revised Formatted Text and Images and Formatted Text and Images (Secured) parts before they appear on your website. You can view the approval status of a part from its Content Approval tab. On the Approvals tab of a workflow, you can view the parts associated with the workflow and their approval statuses.

Note: In *Approvals*, you can view and access all parts with an approval status of "Draft" or "Pending."

- **Draft** – An approval status of "Draft" indicates that a content author created the part but did not yet submit it for approval, such as when the user has not yet finished its design. "Draft" is the default approval status for newly created or updated Formatted Text and Images or Formatted Text and Images (Secured) parts.
- **Pending** – An approval status of "Pending" indicates that a content author designed the part and selected an approval status of "Ready for Approval" on the Content Approval tab of the part, but a user with Content Approval rights has not yet approved its content. If you create a Part Approval – Ready for Approval notification for the workflow, users with Content Approval rights receive a notification to alert them when the content author adjusts the status to "Ready for Approval."
- **Published** – An approval status of "Published" indicates that a user with Content Approval rights reviewed and approved the part, and its content appears on your website. To publish a part's content on the website, the user with Content Approval rights selects an approval status of "Publish" on the Content Approval tab of the part. If you create a Part Approval – Published notification for the workflow, the content author receives a notification when the user with Content Approval rights adjusts the status to "Published."
- **Rejected** – An approval status of "Rejected" indicates that a user with Content Approval rights reviewed the part but did not approve its content. When a user rejects a part, the program generates a new version of the part with an approval status of "Draft." If you create a Part Approval – Rejected notification for the workflow, the content author receives a notification when the user with Content Approval rights adjusts the status to "Rejected."

- **Archived** – An approval status of “Archived” indicates that a user revised a published part. When a content author updates a published part, the program automatically creates an archived copy of the original version and assigns it a status of “Archived.” From the Content Approval tab of a part, users with Content Approval rights can restore its content to an earlier, archived version.

Part Approval Notification Merge Fields

When you design part approval notifications in *Notifications*, use merge fields to customize the notification sent with information specific to the part and its approval status. To display the list of available merge fields, click **Merge fields** on the Insert tab in the toolbar of the Email Template tab. To expand a list, click the plus sign next to **General**. The merge fields specific to workflows and part approval appear.

- **Part Name** – To display the name of the part that the notification applies to, add this merge field. For example, add “Part: <Part Name>.”
- **Status** – To display the current status of the part, add this merge field. For example, add “Part <Part Name> now has a status of <Status>.”
- **Status Updated By** – To display the name of the content author or user with Content Approval rights who updated the status of the part and generated the notification, add this merge field. For example, add “<Status Updated By> updated the status of part <Part Name> to <Status>.”
- **Approvals Gallery Hyperlink** – To include a link to *Approvals* so the recipient can quickly view or update the part as necessary, add this merge field. For example, add “To view part <Part Name> and its content: <Approvals Gallery Hyperlink>.”

Merchant Accounts

In *Merchant Accounts*, you set up merchant accounts to process payments through parts and forms. On each part or form that processes payments, you select a merchant account.

Note: Only users with Supervisor rights can view, create, and manage *Merchant accounts*. When you host multiple sites, you can create a merchant account for an individual site. For more information, see [Merchant Account Security on page 77](#).

To view the parts and forms that use merchant accounts, select the Merchant accounts usage tab. To access parts and forms, go to *Site explorer*.

To process credit card transactions, the program supports merchant accounts from multiple credit card processors available through the *Blackbaud Payment Service*, including *Blackbaud Merchant Services*, Authorize.Net; BeanStream; International Automated Transactions Service (IATS); Moneris Solutions; Payflow Pro, owned by PayPal (formerly Verisign); and Verus Card Services, owned by Sage Payment Solutions.

Warning: PayPal has acquired Verisign. If your organization has a Verisign account, PayPal may contact you to convert to a Payflow Pro account. To ensure the program continues to manage your credit card transactions smoothly, please contact Blackbaud support when you convert to Payflow Pro.

Merchant Account Security

Only users with Supervisor rights can view, create, and manage *Merchant accounts*. When you host multiple sites, you can create merchant accounts for individual sites. To do this, log in to the site and create the merchant account. For more information, see [Go to Site on page 20](#).

To apply site security to a merchant account, select the task right **Use merchant account rights** for site task groups associated with the site. This right provides users with the ability to select merchant accounts for parts and forms. A Supervisor user can select an account from any site for parts and forms.

Note: To use a merchant account for more than one site or all sites, make sure this task right is selected for the site the merchant account was created in.

For information about task rights, task groups, and security assignments, see the *Users & Security Guide*.

➤ Configure a merchant account

1. In *Administration*, click Merchant Accounts. *Merchant Accounts* appears.
2. Select the Merchant accounts tab.
3. Click **New merchant account**. The New Merchant Account screen appears.

New Merchant Account (New merchant account)

Save Help Return

Merchant Account Details

Name: *

Merchant account is inactive

Process mode:

Description:

Gateway Account Details

Gateway:

Currency:

Gateway ID: *

Password: *

Confirm Password: *

AVS Level:

CSC Level:

Use 3DS processing

Supported Credit Cards:

Enable	Card	Processor
<input checked="" type="checkbox"/>	American Express	<input type="text" value="American Express Brighton"/>
<input checked="" type="checkbox"/>	Diner's Club	<input type="text" value="Global Payments Central"/>
<input checked="" type="checkbox"/>	Discover	<input type="text" value="EDS Aurora"/>
<input checked="" type="checkbox"/>	JCB	<input type="text" value="EDS Aurora"/>
<input checked="" type="checkbox"/>	Mastercard	<input type="text" value="EDS Aurora"/>
<input checked="" type="checkbox"/>	Visa	<input type="text" value="EDS Aurora"/>

Additional Fields:

Field	Value
Partner	<input type="text" value="Blackbaud"/> *
User	<input type="text"/>

- Under **Merchant Account Details**, in the **Name** field, enter a unique name for the merchant account.

Note: To support multiple currencies, you must add a merchant account for each currency you process. To differentiate between accounts, we recommend you include the currency type in the name of the merchant account, such as "IATS account for Canadian dollars."

5. To set up the merchant account but not make it available for use on a donation part, select **Merchant account is inactive**.
6. In the **Process mode** field, select whether to use the merchant account to process transactions or for another purpose.
 - To use the merchant account to process transactions, select "Live."
 - To use the merchant account to test the connection with the gateway, if the gateway selected for the merchant account supports a test mode, select "Test."

Note: For details about credit card test and demo information, see [Credit Card Information for Demo and Test Mode on page 82](#).

- To use the merchant account for internal use only and not send data to the gateway, select "Demo."
7. In the **Description** field, enter a description to help identify the merchant account. For example, explain the types of donation parts to use the merchant account.

When you host multiple sites and edit a merchant account, the **Assign to site** field appears so you can move an account from its current site to another site. If the account is in use on the source site, it continues to be on that site. However, the account is now associated with the target site and its security.
 8. Under **Gateway Account Details**, in the **Gateway** field, select the credit card gateway to use with the merchant account.
 9. In the **Currency** field, select the currency to use with the merchant account.

Note: To support multiple currencies, add a merchant account for each currency you process. Your merchant account settings are the same, except for the information you enter in the **Currency**, **Name**, and **Description** fields.

10. When you set up an account with the gateway, you receive a vendor login ID and password. In the **Gateway ID** field, enter your vendor ID.
11. In the **Password** and **Confirm Password** fields, enter your password. Regardless of the characters you enter, only bullets appear in these fields.
12. In the **AVS Level** field, select whether to use the Address Verification Service (AVS) with the merchant account and at what level. For example, you may select to use AVS to process Card Not Present transactions.

Note: The AVS is fraud protection that verifies customer billing addresses submitted through online payment transactions. With AVS, the gateway issues a transaction to authorize the payment. In response, the gateway receives information about the payment, including whether the numeric portion of the street address and Zip code are correct. Depending on the AVS level selected for the merchant account, the gateway uses this information to determine whether to accept the payment. The program performs this service only when the selected gateway supports AVS for the country of the transaction. For information about AVS support, contact your gateway.

- Full: To accept transactions only when both the street address and Zip code match, select this option.
- Medium: To accept transactions when either the street address or Zip code match, select this option. We recommend you select this option.
- Light: To deny transactions only when neither the street address nor the Zip code match, select this option. This level may accept transactions when either the street address or Zip code returns no response, regardless of whether the other criteria matches.
- None: To perform no address verification, select this option.

For more information about how the program uses AVS to protect your account from fraudulent credit card activity, see [Address Verification Service \(AVS\) on page 81](#).

13. If the gateway checks the Card Security Code (CSC) to protect against fraud, the **CSC Level** field is enabled. Select whether to use CSC checks. The Card Security Code, or Card Verification Value (CVV2), appears only on the credit card and not on receipts or statements.

- To perform no CSC check, select "None."
- To accept transactions only when the CSC matches, select "Full."
- To decline transactions only when the CSC does not match, select "Light."

For more information about how the program uses a CSC check to protect your account from fraudulent credit card activity, see [Card Security Code \(CSC\) Check on page 82](#).

14. To indicate whether to use Three-Domain Secure (3DS) authentication for Card Not Present transactions when using a payment processor that supports 3DS, select **Use 3DS processing**.

Tip: Developed by major credit card providers, 3DS authentication is an additional security layer for online transactions. 3DS requires a cardholder to register the credit card through the card issuer's website and specify credentials used to verify online transactions. Examples of 3DS authentication include *Verified by Visa* and *MasterCard SecureCode*.

15. Under **Supported Credit Cards**, the credit cards that the selected gateway can process appear. Select the checkboxes for the types of credit cards available for transactions on your website. For each credit card type you select, in the **Processor** column, select the credit card processor to handle transactions of the card type.

Note: Credit card processors vary in support for AVS and CSC. Before you activate your website, check with the gateway for the latest information. For information about whether and how processors use a CSC check to protect your account from fraudulent credit card activity, see [Card Security Code \(CSC\) Check on page 82](#).

16. If the selected gateway requires additional information, the **Additional Fields** grid appears. In the Value column, enter the information required by the gateway. For example, Payflow Pro requires a **Partner** field so you can enter your organization's Payflow Pro partner.
17. Click **Save**. You return to *Merchant Accounts*. To ensure the secure processing of credit card transactions, the program automatically sends your merchant account information to the *Blackbaud Payment Service*.

Address Verification Service (AVS)

When you set up a Moneris or PayPal merchant account in *Administration*, you select the level of its Address Verification Service (AVS). AVS is fraud protection to verify customer billing addresses submitted through online payment transactions. If you select "Full," "Medium," or "Light," the program uses AVS to process transactions through your merchant account.

With AVS, the gateway issues a transaction to authorize the payment. An authorization transaction only puts a hold on the credit card account for the transaction amount. No charges are applied to the card. If the program does not post a follow-up transaction within a few hours, the authorization transaction expires.

In response to the authorization transaction, Moneris or PayPal returns information about the payment, including whether the bank supports AVS and whether two AVS fields – AVSADDR (numeric portion of the street address) and AVSZIP (Zip code) – are correct. Depending on the AVS level selected for the merchant account, the program uses this information to determine whether to accept the payment transaction.

Note: The program performs this service only when the selected gateway supports AVS for the country of the transaction. For information about this AVS support, contact your gateway.

- Full: To accept transactions only when both the street address and Zip code match, select this option.
- Medium: To accept transactions when either the street address or Zip code match, select this option. We recommend you select this option.
- Light: To deny transactions only when neither the street address nor the Zip code match, select this option. This level may accept transactions when either the street address or Zip code returns no response, regardless of whether the other criteria matches.
- None: To perform no address verification, select this option.

Depending on whether the transaction passes AVS, the program then uses the PNREF value received from the authorization transaction to issue a follow-up transaction.

- If the transaction passes AVS, the program issues a "Delayed Capture" transaction. The delayed capture transaction issues the charge against the credit card.
- If the transaction fails AVS, the program issues a "Void" transaction. The void transaction removes the hold from the credit card, but does not issue a charge against the card.

Tip: If only authorization (AUTH) transactions appear for a specific date in reports, rerun the reports for that date. In the Select Reports Filters section of the Custom Report Template, select at least "Authorization," "Delayed Capture," and "Void" as transaction types. We recommend you also include both "Approvals" and "Declines." In the output field list, include "AVS Street Match" and "AVS ZIP Match."

Card Security Code (CSC) Check

When you set up a Moneris or PayPal merchant account in *Administration*, you select the level of its Card Security Code (CSC) check. CSC is fraud protection to verify the card security code, called the Card Verification Value (CVV2). The CSC appears only on the credit card itself, and not on receipts or statements. If you select "Full" or "Light," the program use a CSC check to process transactions through your merchant account.

When you set up a PayPal merchant account, you also select the types of credit cards available for transactions on your website through your Internet merchant account and the processor to handle transactions of each credit card type. Regardless of the CSC setting on your merchant account, not all processors support CSC checks for all credit card types. Depending on the processor you select, PayPal may not be able to perform a CSC check for all transactions.

Note: None of the processors available in the program support CSC checks on JCB, Diner's Card, CarteB, Enroute, or Switch/Solo credit cards.

- American Express supports CSC checks on only American Express credit cards.
- EDS and Norwest do not support CSC checks on any credit card types.
- FDMS Nashville supports CSC checks on only MasterCard and Visa credit cards.
- FDMS South and PaymenTech support CSC checks on only American Express, MasterCard, and Visa credit cards.
- Nova and Global Central support CSC checks on only Discover, MasterCard, and Visa credit cards.
- Vital, Global East, FDMS North, and Wells Fargo support CSC checks on American Express, Discover, MasterCard, and Visa credit cards.

Credit Card Information for Demo and Test Mode

To use a merchant account to test the connection with the gateway, you select "Test" in the **Process mode** field when you configure the merchant account. To use the merchant account for internal use only and not send data to the gateway, you select "Demo."

Review the following table for credit card information to use in Test and Demo modes. The table includes credit card type and credit card numbers. You can enter any future date for the expiration dates and any three-digit number for Card Security Codes (CSC).

Note: All credit card numbers work in Demo mode. However, a subset of these credit card numbers do not work in Test mode for the gateways that support them. The credit cards that do not work are not known because gateway support varies.

Credit card type	Credit card number
American Express	378282246310005

Credit card type	Credit card number
American Express	371449635398431
American Express	378734493671000
American Express	373599005095005
Diners Club	30569309025904
Diners Club	38520000023237
Diners Club	36462462742008
Discover	6011111111111117
Discover	6011000990139424
JCB	3530111333300000
JCB	3566002020360505
MasterCard	5555555555554444
MasterCard	5105105105105100
MasterCard	5454545454545454
Visa	4111111111111111
Visa	4012888888881881
Visa	4222222222222
Visa	4242424242424242
enRoute	201400000000009
Laser	63049506000000000
Maestro	6759015050123445
Solo	6334960300099354
Solo	6334900000000005
Switch	4911001999992348
Visa Electron	4917300000000008
Visa Electron	4508750000000009

Field Options

In *Field Options*, you can set default privacy settings for profile fields. Privacy settings determine the profile fields that are visible to other members of the community. If a field is public, all website users

can view it. If a field is private, only the individual website user can view it.

Warning: We recommend only website administrators or users with Supervisor rights access *Field options*.

Users can set privacy settings for their profile information in the Profile Form part. The user's settings overwrite the default privacy settings in *Field options*. For example, Home Phone may be marked **Public By Default** in *Field options*, but users can make their phone numbers private on the Profile Form part.

➤ Set privacy defaults for profile fields

1. From *Administration*, click **Field options**. *Field options* appears and lists the profile fields.

The screenshot shows the 'Field options' interface. At the top, there are 'Save' and 'Help' buttons. Below them is a descriptive text: 'Set the default behavior for maintaining the privacy of constituent data on your website. These settings determine which profile fields are visible to other members of the community, when no explicit privacy preference is set by the user.' Below this text is a table with three columns: 'Category', 'Field', and 'Public by Default'.

Category	Field	Public by Default
Bio	Name	<input checked="" type="checkbox"/>
	Title 1	<input checked="" type="checkbox"/>
	Title 2	<input type="checkbox"/>
	First Name	<input checked="" type="checkbox"/>
	Middle Name	<input checked="" type="checkbox"/>

2. By default, all fields are public. To make a profile field private by default, clear its checkbox in the **Public by Default** column.

Warning: After you process users and they visit the profile form, the program locks in your current default privacy settings. It is important to carefully consider your decision for each field because you cannot manually or globally change a privacy setting for existing profiles. You can still change privacy settings for profile fields on the Field options screen, but future changes do not affect existing profiles.

3. Click **Save**.

Custom Parts

In *Administration*, *Custom parts*, you can create a new custom content part type or link to an existing framework part type. After you create or link to the part type, it is available for selection in *Parts*.

Note: *Custom parts* offer additional flexibility, but come with additional complexity. If you host your own website, we strongly recommend only developers knowledgeable in all areas of customizations design them. This includes writing HTML and JavaScript code. Users without this expertise should not design these parts. 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.

To create a custom content part type, click **New content part**. A custom content part uses JavaScript and HTML to create the part editor and define how to display the part on a web page. You can use custom content parts to create customizations such as slideshows, tabbed content, RSS Feed readers, accordion content, pop-up boxes, and callout boxes.

To link to an existing framework part type, click **New framework part**. To build custom framework parts for your website, you should understand Blackbaud Internet Solutions from a site designer's perspective and have a working technical knowledge of ASP.NET. The content for custom framework parts can come from a variety of sources and can be as simple as text or HTML stored in the Blackbaud Internet Solutions database, or it can be data from the back office such as constituent giving history. For example, you can use a custom framework part to create a custom individual search form or a custom pledge form for Blackbaud Internet Solutions.

Action	Name	Require SSL	Description	Type
	Main slideshow	No	Slideshow rotating pics for home page	Content
	News widget	No	Recent news posts	Content

2 custom parts meet selected criteria

To learn more about custom content parts, review [Anatomy of a Custom Framework Part](#) and [Custom Content Parts](#). You can also contact [Professional Services](#). For information about how to create custom framework parts, visit the [Blackbaud Developer Network](#) or refer to the [Developer Guide](#).

Code Tables

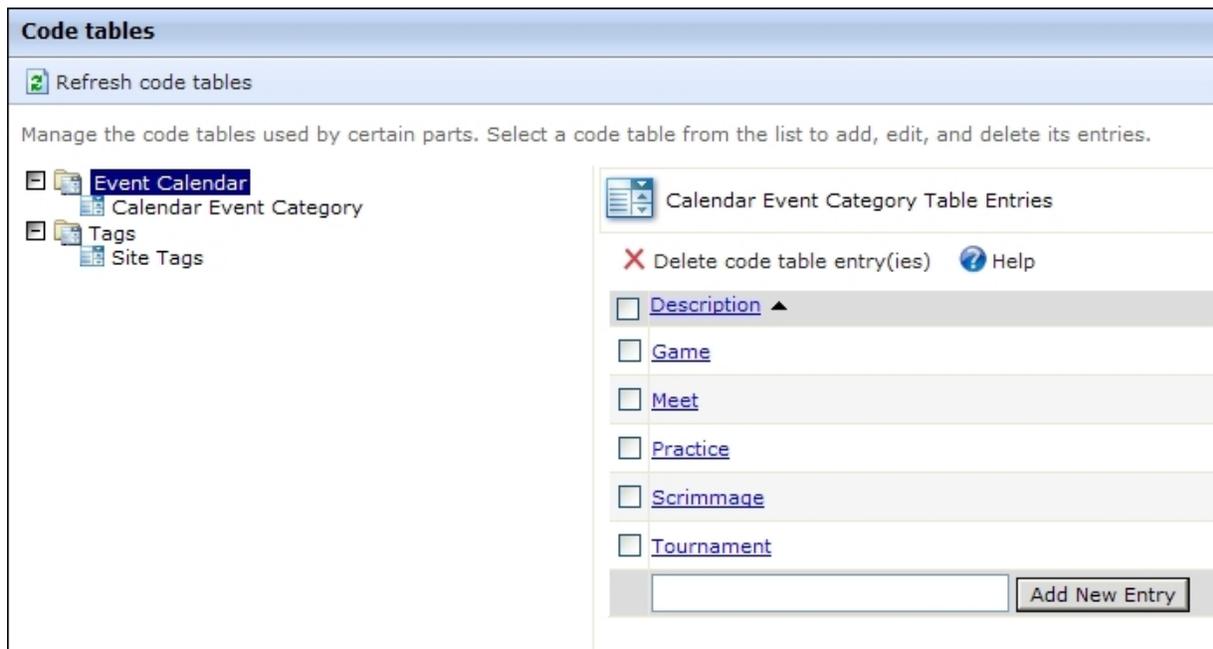
Code tables in this program are similar to those in other Blackbaud programs. In *Code tables*, you can manage a table for event categories. These code table entries are available under **Event Category** on the Event Calendar part.

You can also manage a code table for site tags. This code table contains keywords, or tags, that you can assign to parts to improve site navigation. You can select the tags in this code table on the Tags tab of the Part Editor screen. If you update a table entry, the change cascades to all pages that include a part with this tag. For example, if a Donation Form part with an "Arts" tag is included on two pages with Tag Display parts and you change "Arts" to "Visual Arts" in the site tags code table, "Visual Arts" automatically appears in the tag display for both donation pages.

Tip: Only users with Supervisor rights can view and manage *Code tables*.

> Manage code tables

1. From *Administration*, click **Code tables**. *Code tables* appears.



- To update code tables from Blackbaud CRM, click **Refresh code tables**. For example, to integrate a new table or update an existing one after you add code table entries in Blackbaud CRM, click this button.

Note: The event categories code table under **Event Calendar** and the site tags code table under **Tagging** are both website specific. These code tables are not from Blackbaud CRM. In the event categories code table, you enter event categories to select on the Event Calendar part. In the site tags code table, you enter tags to assign to parts on your website to improve site navigation.

- In the tree-view list, select a code table. In the grid, its code table entries appear.
- To add a code table entry, enter text in the field below the grid and click **Add New Entry**. The entry appears in the grid.
- To edit an entry, click it and update the text.
- To delete an entry, select its checkbox and click **Delete code table entry(ies)**.

Note: Changes to tags in the Site Tags code table automatically appear throughout the program. For example, if you change an "Arts" tag to "Visual Arts," the tag appears as "Visual Arts" in tag displays as well as on the Tags tab on the Edit Part screen. If you delete a code table entry, the program removes the tag from all parts.

- After you make your changes, you can leave *Code tables*. The program automatically saves your changes.

URL Redirects

In *URL redirects*, you can create 301 redirects to reroute traffic when website users try to access old URLs.

Tip: You add URLs that you want to redirect to your primary site URL in *Sites & settings*. For example, you can include URLs with typos or an abbreviation for your organization so that users who mistype the primary URL still reach your site. For more information about these URL redirects, see [General site settings on page 52](#).

301 redirects are a search engine-friendly way to redirect users without losing search engine rankings for web pages. When website users attempt to access the original URLs, the program reroutes them to the new target URLs that you enter in *URL redirects*. The new target URLs allow you to preserve page ranks and maintain back links for the original URLs.

Action	Redirect this page (original)	Creator/owner	To this page (target)
	http://ptlr41/page.aspx?pid=204	Supervisor	http://ptlr41.blackbaud.com/page.aspx?pid=205
	http://ptlr41/page.aspx?pid=205	Supervisor	http://ptlr41.blackbaud.com/page.aspx?pid=206
	http://ptlr41/page.aspx?pid=206	Supervisor	http://ptlr41.blackbaud.com/page.aspx?pid=207
	http://ptlr41/page.aspx?pid=210	Supervisor	http://ptlr41.blackbaud.com/page.aspx?pid=209
	http://ptlr41/page.aspx?pid=211	Supervisor	http://ptlr41/page.aspx?pid=212

5 Redirects meet selected criteria

If you change URLs as part of a site redesign or other changes on your website, you can use redirects to reroute traffic from old URLs to the new URLs.

Likewise, if you migrate to Blackbaud Internet Solutions from an existing website with a domain that you own, you can also create 301 redirects to route traffic from the pages of your old site to the pages of your new Blackbaud Internet Solutions website.

Note: To route traffic from your old website, you must point the domain for the old website at Blackbaud Internet Solutions. For example, if www.oldsite.org and www.newsite.org are both being run through Blackbaud Internet Solutions, then you can set up redirects from www.oldsite.org to www.newsite.org. If www.oldsite.org is hosted somewhere else on a different server and does not run through Blackbaud Internet Solutions, you cannot create redirects because incoming requests are not routed through Blackbaud Internet Solutions.

➤ Create a URL redirect

1. From *Administration*, click **URL redirects**. *URL redirects* appears.
2. Click **New redirect**. The New redirect screen appears.

3. In the **Redirect this page** field, enter the original URL that you want to reroute to another URL. Be sure to enter the full URL, including a protocol such as "http://" at the start.

Note: When you migrate to Blackbaud Internet Solutions from an existing website with a domain that you own, you can create redirects to route traffic from the pages of your old site to the pages of your new Blackbaud Internet Solutions website. However, you must point the domain for the old website at Blackbaud Internet Solutions. If the domain does not run through Blackbaud Internet Solutions, you cannot create redirects because incoming requests are not routed through Blackbaud Internet Solutions.

4. Under **To this page**, select whether to reroute users to another page on your website or to a page on an external site. For a page on your site, click the binoculars and select a page. For a page on another site, enter the URL.
5. Click **Save**. You return to *URL redirects*. When website users attempt to access the original URL, the program redirects them to the new target URL.

➤ Export URL redirects to a CSV file

1. From *Administration*, click **URL redirects**. *URL redirects* appears.
2. Click **Export CSV**. A file download screen appears. Click **Save** to select a location to save a Microsoft *Excel* spreadsheet with your list of URL redirects or click **Open** to view the spreadsheet.

➤ Import URL redirects

1. From *Administration*, click **URL redirects**. *URL redirects* appears.
2. Click **Import CSV**. The Import CSV screen appears.

Warning: The file you import must follow the proper format for *URL redirects*. The program ignores the first row in the spreadsheet because it is reserved for headers. Also, your CSV file must place the original URL in the first column and the redirect target URL in the second column.

3. Under **Import options**, select whether to add the import to your existing redirects or to replace the existing list with the import.
4. Under **Import CSV** file, click Browse to select the import file.

Tip: When you create your import file, remember to enter full URLs, including protocols such as "http://" at the start.

5. Click **Save**. You return to URL redirects and the gallery is updated with the imported redirects.