

Blackbaud CRM Cloud Portal - User Guide

Blackbaud CRM Cloud Portal is a self-service feature offered for *Azure* customers. It's available through *SKY* with an authorized *Blackbaud ID (BBID)* account.

The *CRM Cloud Portal* provides client control over key tasks including: uploading customizations, deploying service packs, and refreshing environments. These tasks can be run on demand or scheduled to run later. Users can view task history and upcoming jobs.

This is not Service Pack dependent. It's available to all *Azure*-hosted customers regardless of Service Pack level.

It is continuously delivered functionality and will evolve over time.

Available activities at launch:

- Refresh Database
- Upgrade Version
- Deploy CRM Customization
- Deploy BBIS Customization
- Deploy BBDW Customization

Blackbaud CRM Cloud Portal Page

The *CRM Cloud Portal* page indicates environment details: Site, Product, Version, and Service Tier. Available actions are shown along with the history of previously/scheduled run activities.

The **Activities** includes columns to show:

- **Name** – The activity being undertaken.
- **Submitter** – If an action was made by an organization admin, their BBID username is shown. If we've taken an action, then Blackbaud is shown.
- **Status** – Pending, Running, Completed, or Failed.
- **Submitted at** – The date and time an activity was created.
- **Completed at** – The date and time an activity was completed.
- **Scheduled for** – The date and time an activity was scheduled.

5740s28

Enterprise CRM
Product
4.0.186.3309
Version
Non-production
Service tier

Activities

 Refresh database  Upgrade  Deploy customization ▾

	NAME	SUBMITTER	STATUS	SUBMITTED AT	COMPLETED AT	SCHEDULED FOR
	Upgrade Client Tenant	Blackbaud	✔ Complete	18/05/2023, 10:12	19/05/2023, 12:03	19/05/2023, 10:30
	Deploy CRM Customization - 918	Michael.Butler@b...	✔ Complete	24/04/2023, 18:36	24/04/2023, 18:37	
	Upgrade Client Tenant	Blackbaud	✔ Complete	20/04/2023, 19:46	21/04/2023, 20:38	21/04/2023, 19:45

If an activity is scheduled for a future date/time, then the first column will also include an option to **Cancel**. Find it on the activity's associated row. Select **Cancel** to delete the scheduled activity and prevent the activity from running.

Activities

Refresh database

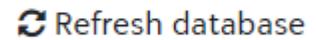
This allows non-production environments to be refreshed. From **Source tenant** select a production database that is available for the refresh.

This activity can be run immediately or scheduled for a future date/time.

A notification will appear and indicate whether the activity request was successful or failed.

You can specify a point-in-time refresh, whether to refresh the *BBDW*, and whether to include *BBDW* or *BBCRM* customizations.

Refresh database



! This operation will DELETE the existing database.

Source database *

Source

Point-in-time restore ⓘ

Refresh BBDW database ⓘ

Include BBDW customizations ⓘ

Include BBCRM customizations ⓘ

Start time *

Run now

Scheduled

Refresh database Cancel

Note: You can only refresh one environment at a time. If you attempt to run or schedule concurrent refreshes you'll receive an error message. If you specify a point-in-time refresh, no new backups will be taken in *BBCRM*, unless the timestamp is less than two hours in the past. If the timestamp is less than two hours in the past or no timestamp is provided, then a log backup is forced.

Update

This allows for non-production environments to be upgraded. The Target version menu will show Service Pack versions available.

This activity can be run immediately or scheduled for a future date/time.

A notification will appear and indicate whether the activity request was successful or failed.

To upgrade your production environment, file a ticket with support.

Note: You can only upgrade one environment at a time. If you attempt to run or schedule concurrent upgrades you'll receive an error message.

Upgrade tenant



Current version
4.0.186.3309

Target version *

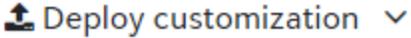
Start time *

Run now

Scheduled

Upgrade tenant

Cancel



Deploy customization

Use this menu to select which products, used by your organization, to which a customization can be deployed.

This allows for customization deployment to both non-production and production *CRM* environments.

You can upload the **Customization ZIP file** into the standard supported file structure (as indicated in the “i” alert).

A warning reminds users that some actions may trigger an application pool recycle.

This activity can be run immediately or scheduled for a future date/time.

A notification will appear and indicate whether the activity request was successful or failed.

Deploy 'CRM' customization for '5740s28'

Customization

 CRM customization zip file supports the following folders (do NOT add an additional root directory):

- \bin\custom
- \browser\htmlforms\custom

 Updating any existing DLLs will cause an application pool recycle.

Customization ZIP file *

 Attach file

Start time *

Run now

Scheduled

Deploy

Cancel

Blackbaud Internet Solutions (BBIS)

This allows for customization deployment to both non-production and production *BBIS* environments.

You can upload the **Customization ZIP file** into the standard supported file structure (as indicated in the "i" alert).

A warning reminds users that some actions may trigger an application pool recycle.

This activity can be run immediately or scheduled for a future date/time.

A notification will appear and indicate whether the activity request was successful or failed.

Deploy 'BBIS' customization for '5740s28'

Customization



BBIS customization zip file supports the following folders (do NOT add an additional root directory):

- \bin
- \custom



Updating any existing DLLs will cause an application pool recycle.

Customization ZIP file *

Attach file

Start time *

Run now

Scheduled

Deploy

Cancel

Blackbaud Data Warehouse (BBDW)

This allows for customization deployment to both non-production and production *BBDW* environments.

You can upload the **Customization ZIP file** into the standard supported file structure (as indicated in the "i" alert).

This activity can be run immediately or scheduled for a future date/time.

A notification will show on-screen indicating whether the activity request is successful or has failed.

Deploy 'BBDW' customization for '5740s28'

Customization



BBDW customization zip file supports the following folders (do NOT add an additional root directory):

- BBDW\Extend\

Customization ZIP file *

Attach file

Start time *

Run now

Scheduled

Deploy

Cancel

Notifications

When an activity has **Started**, **Completed**, or **Failed**, then an email is automatically sent to user who requested the activity and to *Blackbaud*.

If an activity failed, the email will recommend opening a customer support ticket to track the issue. Our *Blackbaud* team will already be aware and working to address the issue.

All emails will include a link to your *Blackbaud CRM Portal* for the corresponding environment.

Control Panel (Users, Roles, History)

To give other users access to the portal, select **Control Panel, User management**. You can add and remove users, as well as determine appropriate permission for those users. When you invite a user, they will receive an email to accept and access the portal. If you want to designate a user as a portal user but NOT a solution admin, you can give them the operator role only. For now, when you assign a user the operator role this means that they have full access to all features of the portal EXCEPT FOR the Control Panel itself.

Note

When you go to the **Control Panel, User management** page for the first time, you will see a blank list with zero users. To view all initial users, you can choose **Show all records**.

The **Control Panel, Security Roles** option is currently limited to the **Operator** role only. We may enhance and add new roles in the future.

The **Control Panel, User History** option enables you to view an audit trail of when users were added, removed, invited or changed.

Navigating to the portal

If your *Blackbaud CRM* environment has *Blackbaud ID* enabled, portal users can navigate to the portal directly from *BBCRM* using the top left dropdown. Otherwise, portal users can navigate to it by logging into *Blackbaud.com* and using the top left dropdown.