General Features Guide

03/26/2021Blackbaud CRM 4.0 General Features US

GeneralFeatures-2016

Contents

General Features

The application provides many features to help you navigate through, access, and share your information. This guide explains various navigation tools in the application and how to use features such as the home page and favorites.

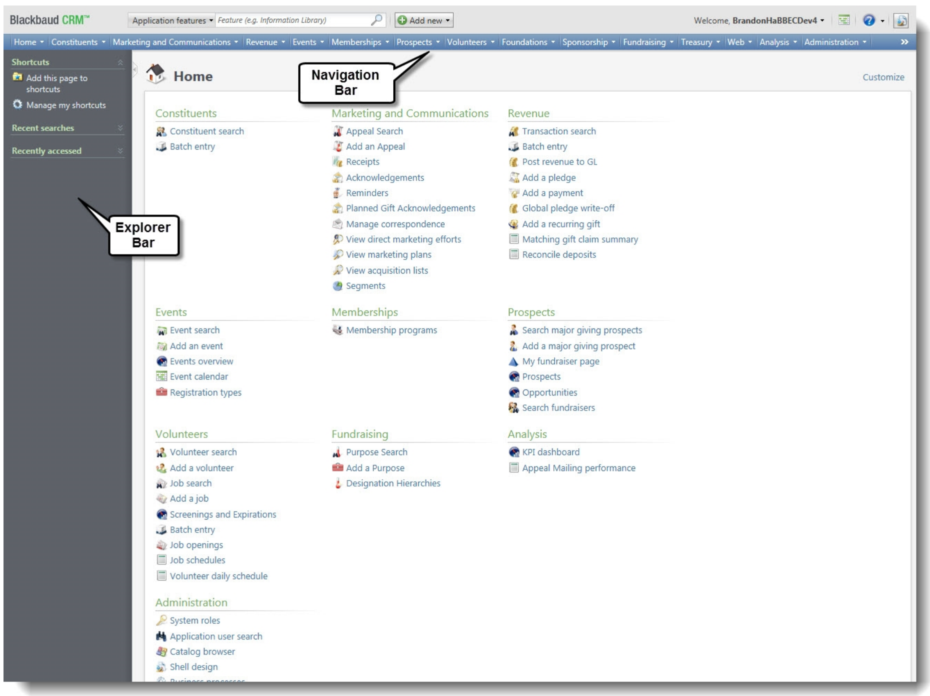
General Navigation

The application includes a variety of navigation features that give you increased control over the software.

Navigation and Explorer Bars

Pages in the application include the following features:

- **Navigation bar**: The navigation bar allows you to navigate through the application and return to your home page. Your role in the application determines the appearance of the navigation bar, and it only displays features that you have permission to access.
- **Explorer bar**: From the explorer bar, you can quickly access recently performed searches, recently viewed records and pages, and shortcuts. Based on the current page, you can also access related tasks and activities.

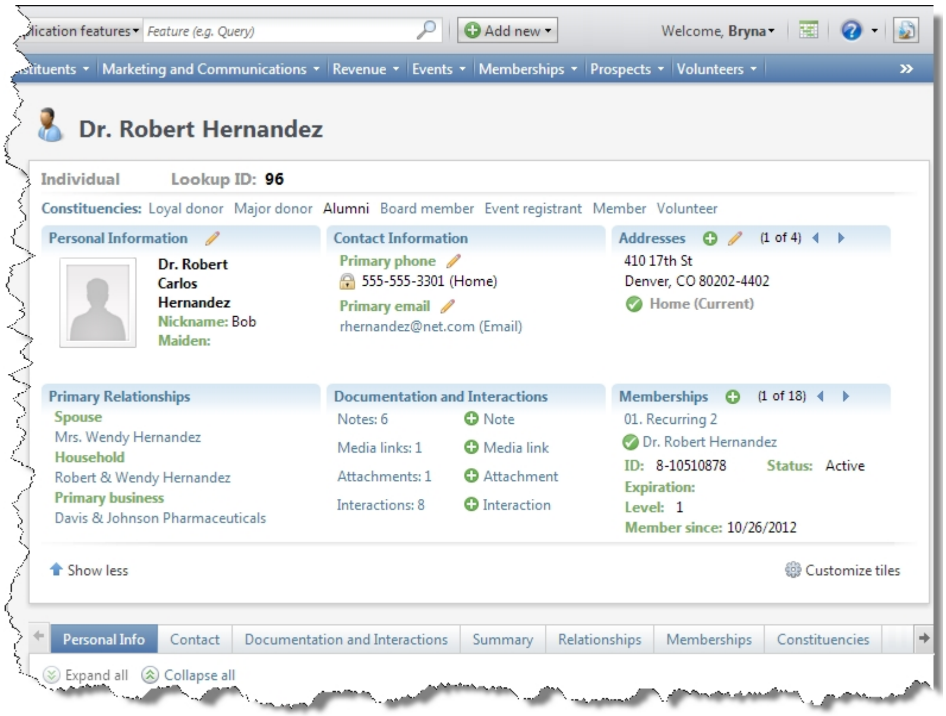


Summary Tiles

Some pages in the application include summary tiles. Summary tiles allow you to quickly view, add, and edit information. Tiles often link to other pages and tabs. You can use these links as shortcuts to navigate throughout the program.

For some pages, each application user can customize which tiles are visible. You can also change the order in which they display.

Tiles respect security settings. If you do not have permission to access the information that a tile links to or displays, that information does not appear.



Shortcuts for My Profile

On the My Profile page, you can use the **Shortcuts** feature to create shortcuts to pages and records that you access frequently. You can specify pages as shortcuts to access them from the **Shortcuts** menu on the explorer bar.

You can also organize, rename, and delete shortcuts and email shortcut links.

Add a shortcut

1. Open the location you want to save as a shortcut.
2. On the explorer bar, click **Add this page to shortcuts**.

Or

1. Under **Shortcuts**, click **Manage my shortcuts**. The My Profile page displays.
2. Click **Add a task**. The Add tasks to shortcuts screen displays. All functional areas in the application containing tasks to which you can create a shortcut display in the **Functional area** box.
3. Select the functional area that contains the task(s) to which you want to link. All tasks display in the **Task** box.
4. Select all tasks to which you want to create a shortcut.
5. Click **Save**.

6. Once a shortcut has been added, you can rename, delete, move, or email a link to the shortcut. Select the shortcut you wish to modify:
   - Select **Rename** to modify the name of the shortcut. Enter the desired name and click **Save** to rename the shortcut.
   - Select **Delete** and press **Yes** to delete the shortcut.
   - Select **Email link** to generate an email message that includes a link.
   - Select **Move to top**, **Move up**, **Move down**, or **Move to bottom** to move the link to the desired location.

Home Page

The Home page appears when you start the application. To return to it, click **Home** on the navigation bar. You can add any page in the program to your shortcuts for ease of navigation. This can be useful if you work primarily in one area of the application or want a certain page to be easy to access. From any page you want to add to your shortcuts, click **Add this page to shortcuts** on the left navigation.

Application-Level Search

The application-level search function helps you find a specific feature in the application when you do not know its location. The search field available at the top of any application page accesses a search engine. Based on the search option you select, the engine searches the program and returns links to all pages, tasks, RSS feeds, and help documentation that satisfy the search criteria. The search engine also overlooks minor spelling errors and respects system security.

Feature Search

A feature search is a quick navigational tool that searches all areas of the application — pages, tasks, RSS feeds — for information that satisfies your search criteria. It is the most general of the search options and likely generates the most results.

For example, if you enter "add constituent" in the **search** field, the Search Results page displays links to areas in the program that match the words "add" and "constituent." On the Search Results page, if you click a task link such as **Add an individual**, the task is invoked and the Add an individual screen appears for you to enter a new constituent. If you click a page link such as **Constituent Giving Information**, a search screen appears and you can search for the constituent whose information you want to view.

To execute a feature-level search, click **Application features** beside the search field and select the feature to search. Enter your criteria in the search field and click the magnifying glass. The results appear on the Search Results page.

Context-Based Feature Search

In the search field, you can include context information and refine your feature search. For example, to locate Robert Hernandez's constituent record, rather than search for just "constituent record," you can include the constituent name: "constituent info?rob hernandez." In the search results, you can click links to various constituent areas in the program with information about Robert Hernandez. When you click a link, constituent information appears or a search screen appears with a list of matching records.

In the search field, you can also call up and display ad-hoc and smart query results. For example, if you have an "Ohio Constituents" ad-hoc query, you can enter "query?Ohio Constituents" in the search field. When you click **Ad-hoc Query Results** in the search results, the Ad-hoc Query page appears for the "Ohio Constituents" query. From this page, you can browse records, edit the query definition, create an export, create tasks, and assign permissions.

Note: For information about **Query**, refer to the Query chapter in the *Query and Export Guide*.

RSS Feed Search

RSS feeds in the program are included by default in feature-level searches. However, you can search for RSS feeds only. This limits the number of results and provides a way to view RSS feeds available.

To restrict your search to RSS feeds, click **Application features** and select **RSS feeds**. Enter your search criteria in the **Find** field and click **Search**. Only RSS feeds that match your search criteria appear on the Search Results page.

Click an RSS feed to access the feed page in the program. From this page, you can review feed data and subscribe to the feed.

Quick Find Search

With the quick find functionality, you can search for and open specific records in the application.

For example, if you click **Application features** and select **Appeals**, you can enter "Fall Mailing" in the search field to search for the fall mailing appeal record. If a single record matches your criteria, the record opens. If multiple records match your criteria, a search screen appears with a list of matching records. You can refine your criteria and execute a new search to locate the desired record.

Configure Search

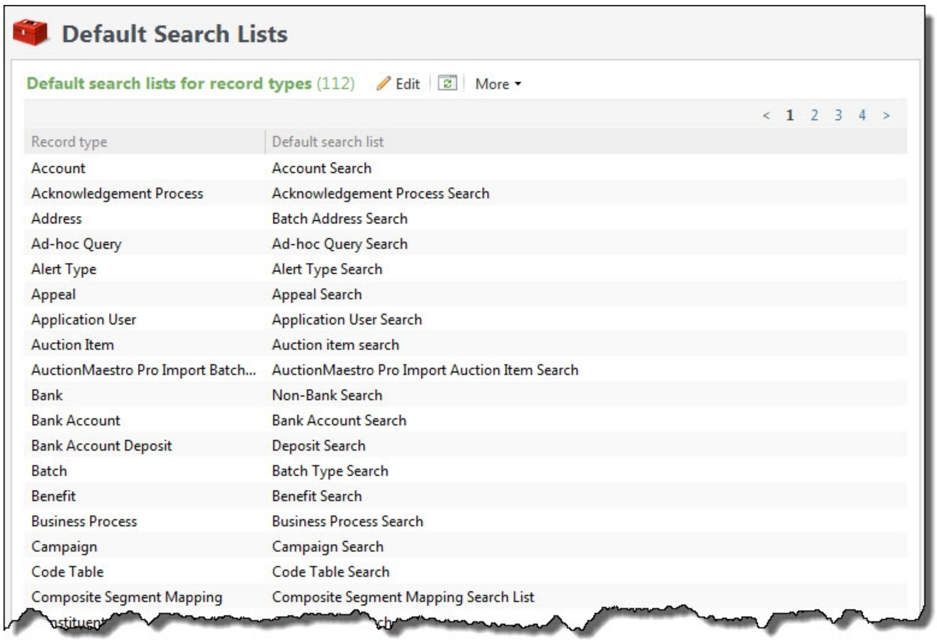
Although the search function includes some items by default, you can edit the search list and expand this number.

Edit Search Lists

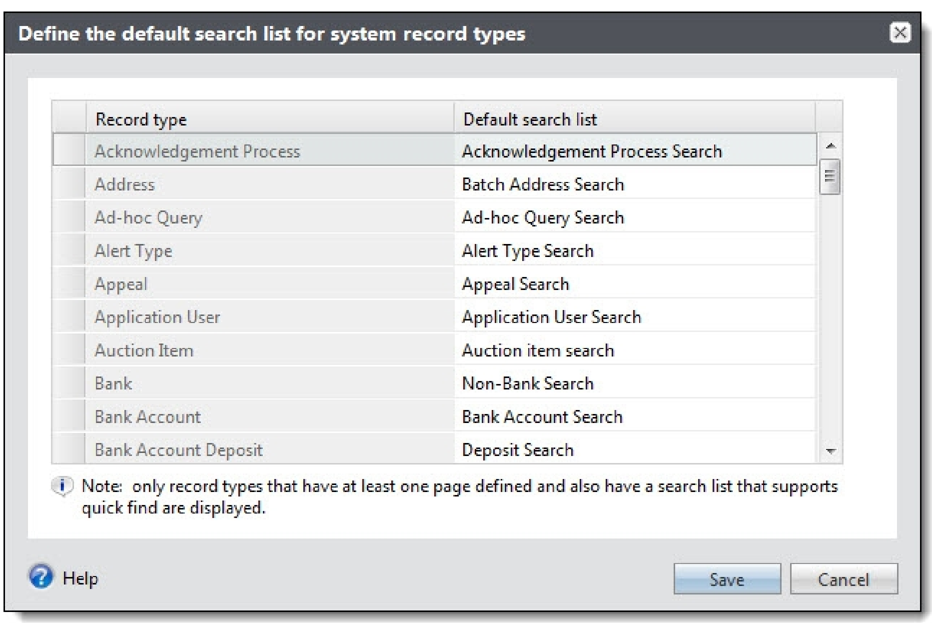
When a feature search returns a feature that requires context, the search page must be able to resolve the context. Context on a feature is always tied to a specific record type, as are search lists; however, each record type can have multiple search lists associated with it. For these records types, you must manually map to the search list to use. For example, the batch record type includes three search lists: batch template search, batch search, and batch type search. With the **Default search list** configuration option in *Administration*, you can select the list to use in your searches.

Select search lists for record types

1. From *Administration*, under **Configuration** click **Default search lists**. The Default Search Lists page appears. This page displays a list of record types mapped to related search lists.



2. Click **Edit**. The Define the default search list for system record types screen appears.



3. On the **Default search list** column, select the list to use for the record type.
4. Click **Save**. You return to the Default Search Lists page. Your changes appear in the grid.

Add New

If you want to quickly add a new item to the system, you can use the **Add new** button next to the search field. A list of the most commonly added items will display. Select an option to display the add screen for that item.

Rearrange Tabs

You can now drag and drop tabs and subtabs into any order you prefer. This is a sticky setting, so it is saved the next time you access any record of the same type. This allows you to organize the tabs in the order that makes sense for your workflow. Any record that uses tabs, such as Constituents, Revenue, Events, and so on, can use this feature.

Note: There is no way to reset the tabs to their default setting once they have been moved. They must be moved manually in order to reset them to the default.

Calendars

Various calendars are used throughout the application to provide a view of scheduled items related to your organization or community. These can include upcoming events, mailings, holidays, or other items related to the specific calendar currently open. In addition to an effective view of scheduled items, many calendars provide tools to add and edit items directly from the calendar, which can save you time.

Although the calendars displayed throughout the application may have different purposes, they each have several common components to help you more effectively view and interact with information. For example, filters provide a way to narrow or expand the items displayed on the calendar and color-coding helps you identify items.

To help customize calendars for how you work, you can change the colors used to identify specific items on the calendar. To change the colors defined for each item that appears on the calendar, click **Customize style**. In the grid, within the **Style** column, click the down arrow and select a color to assign to each. Click **OK** to save.

Workspace for Your System Role

If your role allows, you can access a workspace from your home page to view and manage tasks associated with your role and key performance indicators (KPIs) to track the effectiveness of your efforts. You can also access the organization calendar to view activities scheduled at your organization. By default, you can access the workspace from your home page. On the default home page, click

Development workspace. The Workspace page appears and displays information pertinent to your role.

If your organization enables email alerts, you can configure and manage your email preferences from the Workspace page. For example, you can enter the email address to receive alerts or select whether to receive specific alerts. Under **Tasks**, click **Email preferences**. Your application user record appears. For information about how to configure email preferences, refer to the *Administration Guide*.

Depending on your role and the activities you perform, the workspace may contain multiple tabs to help you navigate through the information.

Organization Calendar

On the Organization Calendar tab, you can view scheduled items related to your organization or community, such as to help schedule and coordinate activities and processes. From the calendar, you can add and manage calendar items such as holidays, community events, or scheduled breaks in your organization's operation. You can also select the type of activities to view during a specific period of time.

Note: For information about how to add and manage items or set filters on the Organization Calendar, refer to the *Administration Guide*.

My Assignments

On the My Assignments tab, you can view and manage assignments related to your system role. For example, if you work with mailings or interact with constituents, your mailings and constituent interactions appear under **My assignments**. If you work with batch entry, batches assigned to you such as for data entry or approval appear. You can select whether to display only a specific type of assignment and whether to display completed assignments. To filter the grid, select the criteria for the assignments to view and click **Apply**. To remove the filter, click **Reset**. To update the information in the grid, click **Refresh List**. From the grid, you can add and manage your assignments as necessary. To view additional information about an item related to an assignment, such as a batch or an interaction, select it in the grid. The record of the item appears.

Note: If your role allows, you can manage your batches from the Workspace page. To access the Batch Entry page, such as to manage additional batches, under **Administration** click **Batch**. For information about batch entry, refer to the *Batch and Import Guide*.

Donors

If your role works with revenue transactions, the Donors tab appears. Under **Donors**, you can view the constituents associated with recent pledges and payments toward donations or recurring gifts. You can select the recent time period of the transactions to view, such as Today or This month. You can also select to view only transactions above a specific revenue amount within the selected time period. To filter the grid, select the criteria for the transactions to view and click **Apply**. To remove the filter, click **Reset**. To update the information in the grid, click **Refresh List**. To view additional information about a donor, select the donor in the grid. The record of the constituent appears.

KPIs

On the KPIs tab, you can view key performance indicators (KPIs) to track the effectiveness of activities pertinent to your role. KPIs track your strategic performance to help determine a course of action. When you monitor your business activity with KPIs, you can place a value on otherwise difficult to measure activities such as leadership development. To view the value of a KPI, select it under **KPIs**. To update the value of a KPI, such as to include recent activity, select it in the grid and click **Update KPI value**. To view additional information about a KPI, select it in the grid. The record of the KPI appears.

> ***Note:*** If your role allows, you can view your KPIs from the Workspace page. To access the KPI Instances page, such as to add or manage KPIs, under **Analysis** click **Information library**. For information about KPIs, refer to the *Reports and KPIs Guide*.

Smart Queries

On the Smart Queries tab, you can view smart queries to access records based on criteria pertinent to your role. Smart queries are designed to allow you to easily create a query that is not ad-hoc but groups records based on specific criteria such as SYBUNT (constituents who gave Some Year But Unfortunately Not This year). You can use smart queries for the same purposes as ad-hoc queries, such as to casually browse records or generate a selection for use in other processes. To view the results of a smart query, select it under **Smart queries**. The record of the smart query appears.

> ***Note:*** If your role allows, you can view your smart queries from the Workspace page. To access the Query page, such as to add or manage smart queries, under **Analysis** click **Information library**. For information about query, refer to the *Query and Export Guide*.

Change Password

All users should change their passwords the first time they log into the application and on a regular basis according to your organization's security policy.

> ***Note:*** If your organization does not host the program through Blackbaud and does not use organizational units, please contact your system administrator for information about how to change your password.

All passwords are case sensitive and must meet the following complexity standards:

- A password cannot be the same or too similar to a previously used password.
- Passwords must be at least fourteen characters in length.
- Passwords must contain at least three of the following four character types: uppercase letters (ABC), lowercase letters (abc), numbers (123), or symbol characters (!@#).

Change your password

1. On the menu bar, in the upper-right, click **Welcome** and select **Change password**.

   The Change password screen appears.
2. In the **Old password** field, enter your current password.
3. In the **New password** and **Confirm password** fields, enter a new password that meets the following complexity requirements:
   - A password cannot be the same or too similar to a previously used password.
   - Passwords must be at least fourteen characters in length.

- Passwords must contain at least three of the following four character types: uppercase letters (ABC), lowercase letters (abc), numbers (123), or symbol characters (!@#).

4. Click **Save**.

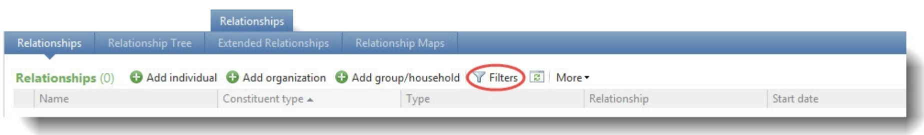
Refresh a Page

When you work in the application, you might encounter a situation where a record is changed by another user while you view it. If this happens, the information on the page might be inaccurate. You can refresh the page to display the most current information in the database.

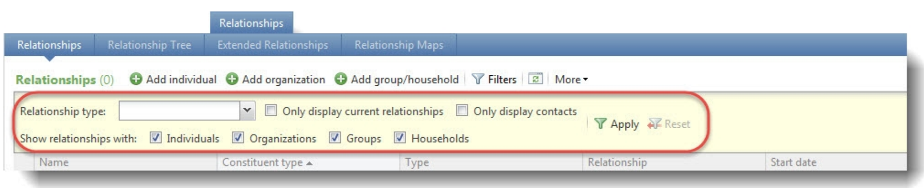
Filters

The **Filter** button allows you to customize entries in data lists. You can use the **Filter** button to select record types to display in a list or to select a date range. The filter options that appear depend on the type of data in the list.

For some data lists, the filter options always appear above the lists. For other data lists, you must click **Filter** to open the filter options.



The filter options that appear depend on the data list.



When you apply filters to a list of items, the application remembers your filter settings and uses them as defaults the next time you view the list. For example, if you typically are only interested in the most recent transactions on a constituent's revenue history, you can apply a date range filter of "Last week." When you go to any constituent record and view the revenue history, it uses the default filter and displays only transactions that took place in the last week. If you apply a date range filter of "Last quarter," the next time you view the revenue history, it displays transactions from the last quarter.

Filter settings are stored for each user, so a user's defaults do not impact anyone else. Filter settings are also stored across sessions, so you can log out and log back in and still see your defaults.

Note: There are also filters on some dashboards and reports; however, these settings are not stored and must be reapplied each time you access the dashboard or report.

You can also sort the information that appears in a datalist by clicking on a column heading. For example, you can click on a **Date** column heading and items will be listed in chronological order. Sort options are not stored and must be reapplied each time you access the datalist.

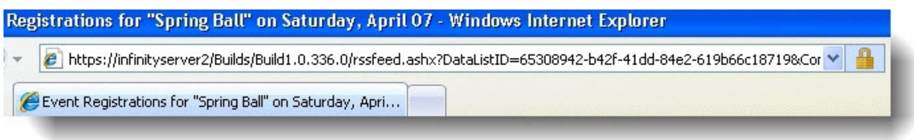
Really Simple Syndication (RSS)

You can use the program to publish lists of data, such as registrations for an event, as Really Simple Syndication (RSS) feeds. RSS is a simple XML-based system that lets users subscribe to content such as news or website updates and then aggregate it into a single location using RSS-aware software. With this feature you can target important information to members of your organization. Users who subscribe to the RSS feed can view the information as it is updated in the program. For example, an RSS feed can supply the person responsible for a special event with up-to-date registration information.

Use the RSS feature

1. Locate a data list that has been RSS-enabled in the application. The **View RSS feed** icon denotes a data list that can be subscribed to as a feed.

2. Click **View RSS feed**. A link to the feed opens in your default web browser.



Note: The link to the RSS feed is in the form of a text-based URL. For example, https://<**SERVER NAME**>/<**SERVER PATH**>/<**RSS FEED LINK**>.

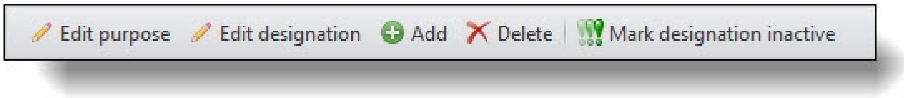
3. If the web browser supports RSS, it can give you the option to subscribe to the feed.

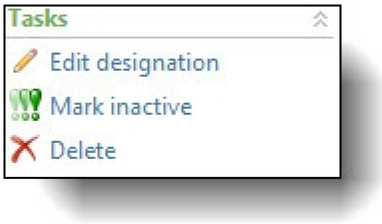
4. You can use the browser's built-in functionality to subscribe to the feed, or you can copy and paste the link to the RSS feed into a preferred software or service. The method used to view the feed determines how it looks.
5. The link to the RSS feed can also be shared with other users. You can send the URL and they can view the feed with an RSS-enabled software or service. As the information is updated in the program, the information in the related RSS feed is visible to all subscribers.

Mark Data as Inactive

When you delete information from the database, you cannot recover that data. As an alternative, you can mark data such as constituent records or membership program levels as inactive. This allows you to retain the information in the database but exclude it by default from lists, search results, queries, and reports.

To mark data as inactive, you select it in the grid and either click **Mark inactive** in the action bar or under **Tasks** in the explorer bar. You can use filter options in the program to include inactive data in lists, search results, queries, and reports.





To restore inactive data, you select it in the grid and either click **Mark active** in the action bar or under **Tasks** in the explorer bar.

Navigation Tree

The navigation tree is an efficient way to view multiple, nested pages of information. The navigation tree displays information as an expandable, hierarchical set of links to other pages. This lets you to see the big picture rather than a single path.

For example, you can open a fundraising purpose and get a broad view of all the activities involved by displaying links to all of the associated appeals.

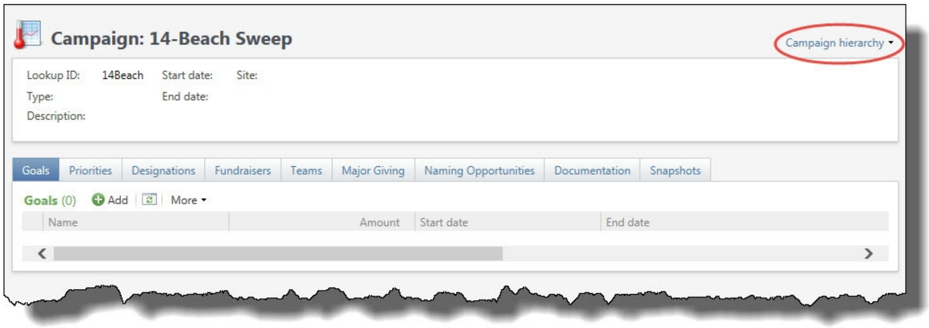
If a navigation tree is available, it is collapsed on the top-right side of the page. To expand the navigation tree, click the link.

Note: When using the Help Panel, navigation trees display next to the page name. When legacy Help is used, navigation trees display on the top-right side of the page. For more information about help configuration, refer to Configure Help Type.

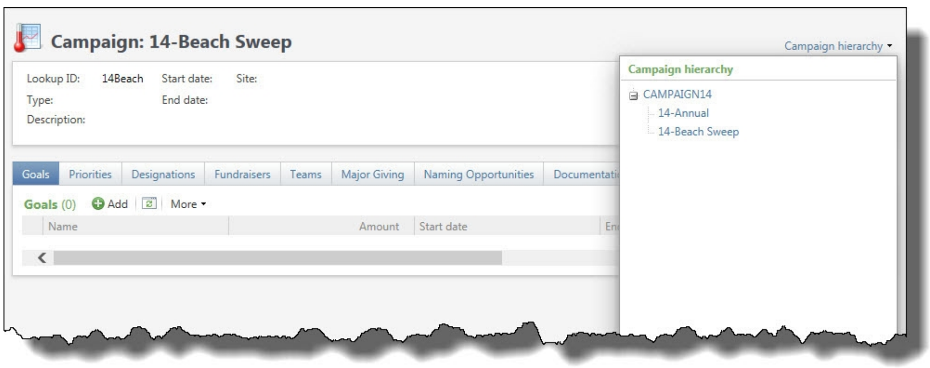
Access the navigation tree

1. Navigate to a page with a navigation tree. The navigation tree is collapsed on the top-right side of the page.

   Note: When using the Help Panel, navigation trees display next to the page name. When legacy Help is used, navigation trees display on the top-right side of the page. For more information about help configuration, refer to Configure Help Type.



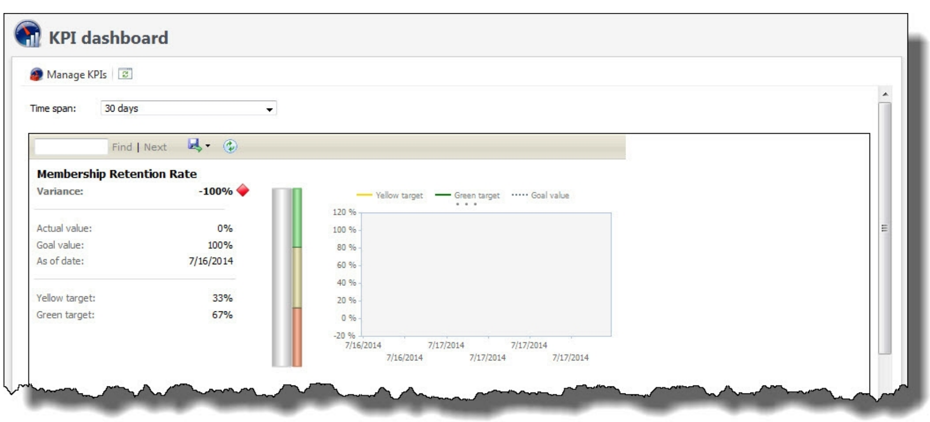
2. Click the link. The navigation tree appears. Click the link again to close the navigation tree.



3. When the navigation tree is open, you can view information about connected pages.
   - To expand and collapse the nested groups, click the plus and minus icons beside the page.
   - To access a page, place your cursor over the page name and click the link.

KPI Dashboard

All users have a personal dashboard, displaying key performance indicator (KPI) data. The dashboard includes data from every KPI instance that the user has permissions to.

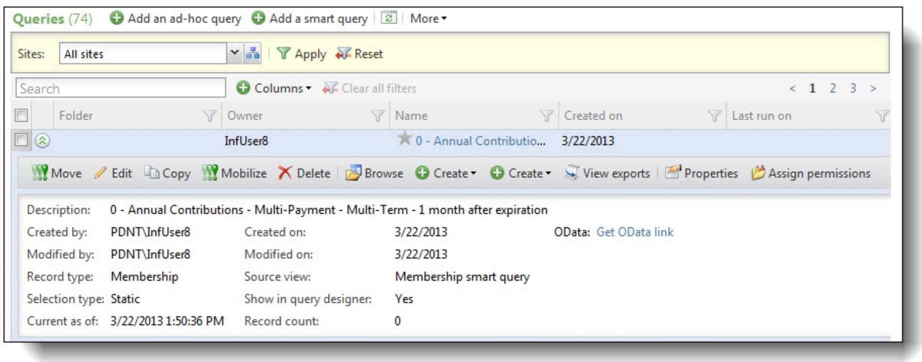


The KPI dashboard stores all KPI values and statistics in an easy to view format. You can modify the **Time span** to make it easier to access the information you need. You can also export the information to Microsoft *Excel* or Microsoft *Word* or generate a PDF.

For more information about KPIs, refer to the *Reports and KPIs Guide*.

Lists

There are two types of lists in the program: data lists and list builder lists. List builder lists include more advanced options for sorting and navigating the data on the list.



The following features are available in data lists and list builder lists.

- To sort the grid data by a specific column, click the column header. The column is sorted in ascending order. Click the column header again to sort in descending order.
- To auto-size list columns, click **More**, **Autosize all columns**. The columns will adjust to fit the largest piece of data contained within each column.
- To revert back to the grid defaults, click **More**, **Restore grid defaults**.

> ***Tip:***
> After you make desired list changes, we recommend you save your list for future access. You can save as many lists as you need to segment and review data.

You can also complete tasks for records on the list. To access task buttons, click the double arrows next to a record to expand the row. Expanded rows may also include additional information about the record.

After you create a list, you can download the information for future reference. You can download a list as a comma-separated values (.CSV) file or a Microsoft *Excel* (.XLSX) spreadsheet. For example, you can download a .CSV file of addresses to provide to a mail house, or export an *Excel* spreadsheet for use outside of the program.

- To download a list, click **More** and then click **Download to CSV** or **Download to XLSX**.
- To save a list, click **Save list**. In the Save list screen, enter a name and description to identify the list and click **Save**.
- To open a saved list, click **Open list**. In the Open a list screen, click the name of the list. To narrow down the lists that appear, search for a list by its name.

> ***Note:*** Saved lists are visible to any user that has access to that data list. However, saved lists do respect data security permissions.

> ***Note:*** Not all lists currently support the save and open list features.

These features are exclusive to list builder lists:

- To filter data in a column, click the filter icon.

  Enter your filter criteria based on the data in the column. For example, for a date-based column, you can enter date criteria, such as all donations after 11/1/2012. For name-based columns, you can enter the name by which you want to filter, such as all registrants with the last name Williams.
- You can search for specific list items in the **Search** field. The program uses your criteria but only searches through the first 500 records that display for the list. Before you use the search, we recommend you use the column filters to narrow down the results.
- To select which columns to display, click **Columns** and select which columns to show and hide. Use the **Search** field to quickly find a column by name.
- To reorganize columns in the grid, drag and drop a column header.
- Columns and filters are sticky by user.

Documentation

On the Documentation tab, you can add notes to track helpful or interesting information about your records. You can save links to websites or related materials stored outside of the program. You can also attach items directly to records. When you attach a file, the program stores a copy in the database.

Attachments

You can attach items to records. When you attach a file, the program stores a copy in the database.

Add Attachments

You can use attachments to track additional details about records. When you attach a file, the program stores a copy in the database.

Add an attachment

1. Go to the Documentation tab of a record.
2. Click **Add attachment**. The Add an attachment screen appears.
3. Select an attachment type. Enter the date, title, and author. To search for the attachment, click **Choose file**.
4. Click **Save**. You return to the Documentation tab.

Add an Attachment Screen

Screen Item	Description
Type	Select the type of attachment. The system administrator configures attachment types.
Date	Enter the date of the attachment.
Title	Enter the title, or purpose, of the attachment.
Author	To search for the author, click the binoculars. A search screen appears.
File	To locate the attachment, click **Choose file**. To view an attachment, click **Open file**. To remove an attachment, click **Clear file**.

Edit Attachments

On the Documentation tab, you can edit an attachment. You can remove a file and choose a different file. You can also view an attachment.

Edit an attachment

1. Go to the Documentation tab of a record.
2. Click the double arrows beside an attachment and click **Edit**. The Edit attachment screen appears.
3. Make changes as necessary to the attachment type, date, title, or author. To view an attachment, click **Open file**. To remove an attachment, click **Clear file**. To select a different file, click **Choose file**.
4. Click **Save**. You return to the Documentation tab.

Delete Attachments

After you add an attachment to the Documentation tab, you can delete it as necessary.

Delete an attachment

1. Go to the Documentation tab of a record.
2. Click the double arrows beside an attachment and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the attachment no longer appears.

Media Links

On the Documentation tab, you can save links to websites or related materials stored outside of the program.

Add Media Links

When you add a media link, you enter the website address.

Add a media link

1. Go to the Documentation tab of a record.
2. Click **Add media link**. The Add a media link screen appears.
3. Select a media link type. Enter the date, title, and author. Enter the URL for a website.
4. Click **Save**. You return to the Documentation tab.

Add a Media Link Screen

Screen Item	Description
Type	Select the type of media link. The system administrator configures media link types.
Date	Enter the date of the media link.
Title	Enter the title, or purpose, of the link.
Author	To search for an author, click the binoculars. A search screen appears.
Media URL	Enter the URL for a website.

Edit Media Links

You can edit the URL for a website.

Edit a media link

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a media link and click **Edit**. The Edit media link screen appears.
3. Make changes as necessary to the media link type, date, title, or author. You can edit the URL for a website.
4. Click **Save**. You return to the Documentation tab.

Delete Media Links

After you add media links to the Documentation tab, you can delete them as necessary.

Delete a media link

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a media link and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the media link no longer appears.

Notes

On the Documentation tab, you can add notes to track helpful or interesting information about your records.

Add Notes

On the Documentation tab, you can track notes about your records.

Add a note

1. Go to the Documentation tab of a record.
2. Click **Add note**. The Add a note screen appears.
3. Select a note type. Enter the date, title, author, and the content of the note.
4. Click **Save**. You return to the Documentation tab.

Add a Note Screen

Screen Item	Description
Type	Select the type of note. The system administrator configures note types.
Date	Enter the date of the note.
Title	Enter the title, or purpose, of the note.
Author	To search for an author, click the magnifying glass. A search screen appears.
Notes	Enter the content of the note.

Edit Notes

On the Documentation tab, you can edit notes as necessary.

Edit a note

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a note and click **Edit**. The Edit note screen appears.
3. Make changes as necessary to the note type, date, title, author, or note content.
4. Click **Save**. You return to the Documentation tab.

Delete Notes

After you add notes to the Documentation tab, you can delete notes when necessary.

Delete a note

1. Go to the Documentation tab of a record.
2. Click the double arrows beside a note and click **Delete**. A confirmation message appears.
3. Click **Yes**. You return to the Documentation tab, and the note no longer appears.

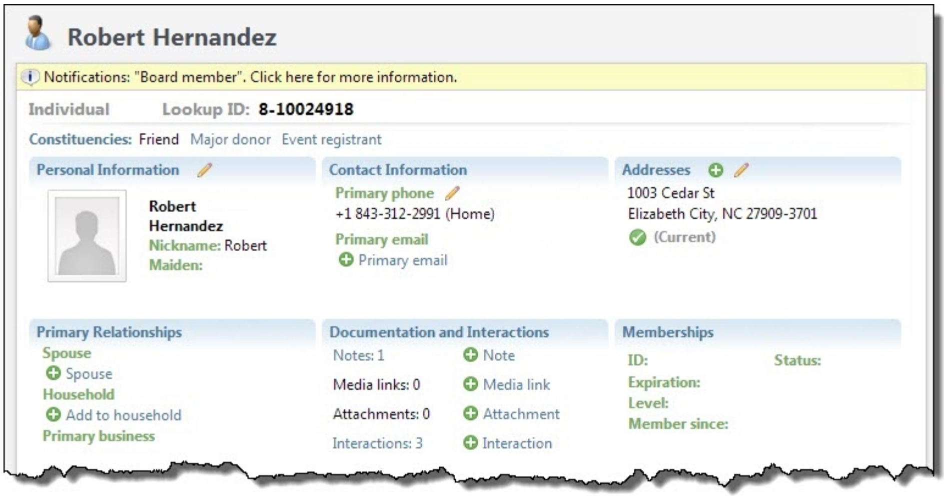
Notifications

Notifications allow you to share important information about a record or a group of records with users. You can determine whether all users should receive a notification or only a targeted group of users. For example, you notify all users to when they open the record of a board member.

Notifications are not available for every record type. They are available only for:

- Bank Account Adjustment records
- Bank Account Deposit records
- Bank Account Deposit Correction records
- Constituent records
- Event records
- Membership records
- Planned Gift records
- Research Group records
- Revenue records

Notifications appear on the information bar of a record.



Note: Notifications for constituents also appear in the Constituent Window of a revenue batch.

You can also set notifications to appear on a separate screen when users view a record. The notification screen appears the first time a user views a record during a session. If you leave the record and return within 60 minutes, the notification screen does not appear again. However, if you return after more than 60 minutes, the notification screen appears again.

You can create notifications for groups of records in *Administration*. You can also create notifications for a record from the Documentation tab of the record.

Add Notifications to Specific Records

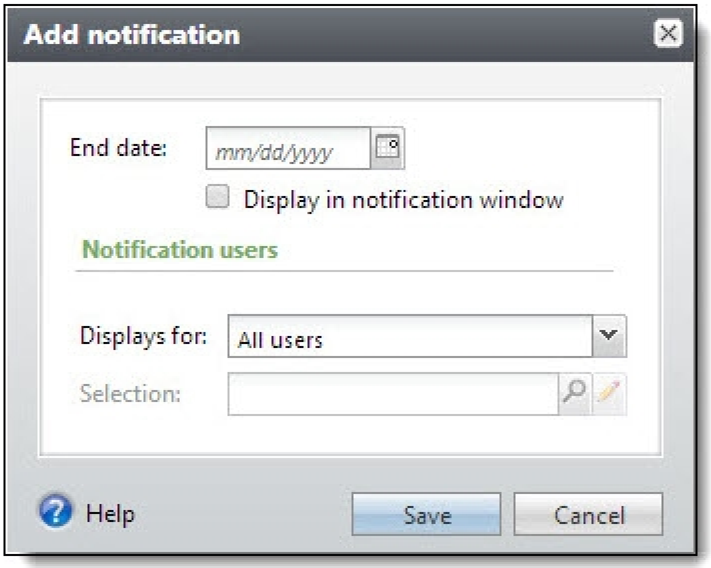
On the Documentation tab, you can add a notification to a note on a record. You can select or create a note with the notification's message and add the notification to the note.

Add a notification

1. Go to the Documentation tab of a record.
2. Select a note to use for the notification. The note's title and text appear as the notification.

Note: You must add a note to the record before you can add a notification.

3. Click **Add notification**. The Add notification screen appears.



4. Select how long to display the notification, whether to display it in a notification window, and the users who view the notification.
5. Click **Save**. You return to the Documentation tab.

Edit Notifications for Specific Records

After you add a notification to a record, you can edit its properties on the Documentation tab. You can change how long to display the notification and who views it. To edit the notification's content, you edit the note associated with the notification.

Edit a notification

1. Go to the Documentation tab of a record.
2. Click the double arrows beside the note with the notification and click **Edit notification**. The Edit notification screen appears.
3. Make changes as necessary to the notification, such as how long to display it and who views it.

Note: To edit the notification title or content, edit the note itself.

4. Click **Save**. You return to the Documentation tab.

Delete Notifications from Specific Records

On the Documentation tab, you can delete a notification when you no longer need it.

Note: For a constituent record, go to the Documentation and Interactions tab. Then click **Documentation**.

To remove a notification from a record, click the double arrows beside the note with the notification to remove and click **Delete notification**.

Open Attachment Files

After you add an attachment on the Documentation tab, you can open the attachment. To do this, click the double arrows beside the attachment and click **Open file**.

Reports Toolbar

When you generate a report, you can use the report toolbar to modify how you view the report. The toolbar buttons are common to all reports.

Toolbar item	Description
First Page	On a report with multiple pages, click this button to return to the first page.
Previous Page	On a report with multiple pages, click this button to return to the previous page.
Current Page	The chronological number of the selected page appears. To navigate to a specific page, enter the page number and press **ENTER**.
Next Page	On a report with multiple pages, click this button to return to the previous page.
Last Page	On a report with multiple pages, click this button to go to the last page.
Refresh	To refresh information to include new or updated data, click this button.
Export	To select a file format for exporting, click this button. File types include XML file with report data, CSV (comma delimited), TIFF file, pdf file, Web archive, *Excel*, and *Word*. **Note:** In exported reports, such as PDF versions of the reports, some items may appear as links. These currently direct you to the Blackbaud website, instead of to the specific records in the program.
Search Text	To search the report for a word or phrase, enter the text in this field and click Find.
Find	To search for text entered in the Search Text field, click this button.
Next	To search for the next instance of text in the Search Text field, click this button.

HTML Editor

The program provides a powerful HTML editor to allow you to format and lay out content. With the HTML editor, you can update content easily and safely while you maintain control over the design and content.

You can use the HTML editor in different views, depending on your HTML experience and where you access the HTML editor in the program.

- **Normal** – When you open the HTML editor to create or edit content, this is the “normal” view. This view is similar to a standard word processing application. By default in normal view, when you press **ENTER**, you create a <p> tag in the HTML content to indicate a new paragraph. When you press **SHIFT + ENTER**, you create a <br> tag to indicate a single carriage return in the content.

- **HTML** – To view or edit the HTML source code, click **HTML Code** on the View tab in the toolbar. The HTML Source Editor screen appears. To return to the normal view, close the window. You cannot use the HTML view to embed your own form via HTML in the HTML editor. We recommend you put the form on a page that is not stored in the program but can be referenced in an iFrame. For more information about how to include customized forms in the program, contact Blackbaud's Professional Services at solutions@blackbaud.com.
- **Preview** – To view the content as it will appear on the web page and to test hyperlinks, click **Preview** on the View tab in the toolbar. The Preview screen appears. To return to the normal view, close the window.

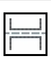
HTML Editor Functions

These tables explain the buttons and menus on the toolbar of the HTML editor. Some features have more buttons available than others.

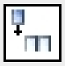
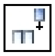
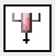
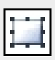
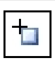
Note: On your website, users can use an HTML editor with a limited set of these buttons on some parts. With the HTML editor, users can also insert images, tables, or links.

Buttons on the Toolbar

Button	Function	Description
	Full screen	To work in full screen mode, click **Full screen**. To turn off full screen mode and view the screen at its normal size, click **Full screen** again.
	Preview	To view the content as it will appear on the web page, click **Preview**. The Preview screen appears. To return to the normal view, close the window.
	**Print**	To print the current content, click **Print**. The Print screen appears. Select the printer and your print preferences, and click **Print**.
	Edit HTML source	To view or edit the HTML source code, click **Edit HTML source**. The HTML Source Editor screen appears. To return to the normal view, close the window.
	**Clean up HTML**	To remove unnecessary tags from the HTML, click **Clean up HTML**. The Clean Up HTML screen appears. With the buttons on this screen, you can remove all HTML tags, remove all Microsoft *Word*-specific markup, clean up stylesheets, clean up <Font> tags, and clean up <Span> tags.

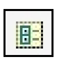
Button	Function	Description
	**Spell check**	To check the spelling, click **Spell check**. When you turn the spell checker on, it checks the spelling of all existing content in the HTML editor and will check new content as you create it. When the spell checker finds an error, a red squiggly line appears below the word. Right-click the underlined word to select the correct spelling. You can also spell check in different languages. Use the drop-down to the select the language.
	**Find and replace**	To find and replace text, click **Find and replace**. The Find/Replace screen appears. In the **Find what** field, enter the text to search for. In the **Replace with** field, enter replacement text. To search for the text, click **Find next**. To replace the text, click **Replace**. To replace all instances, click **Replace all**.
	**Cut**	To remove text from the content area and copy it to the clipboard, click **Cut**. The text is removed, and you can paste it elsewhere in the content area.
	**Copy**	To copy text to the clipboard, click **Copy**. You can paste the text elsewhere in the content area. ***Note:*** For *Firefox*, security settings disable the **Copy** button. To copy text to the clipboard in *Firefox*, highlight it and press **CTRL-C**.
	**Paste**	To paste text from the clipboard, click **Paste**. The text appears in the content area. It retains the formatting from when you cut or copied it. *Note:* For *Firefox*, the **Paste** button in HTML mode removes HTML tags. To paste text with HTML tags in *Firefox*, press **CTRL-V**. For *Firefox* on Macs, you cannot paste text with HTML tags in HTML mode because Ctrl-V also removes the HTML tags.
	**Paste plain text**	To paste text from the clipboard without any formatting, click **Paste plain text**. The text appears in the content area and does not retain its formatting.
	**Paste from Word**	To paste text from the clipboard that you copied from Microsoft *Word*, click **Paste from Word**. The text appears in the content area without the proprietary HTML of *Word*. The text format may differ from the format in *Word*.
	**Insert page break**	To insert a printed page break, click **Insert page break**. The HTML editor adds a division with an attribute of PAGE-BREAK-BEFORE: always at the selected location.
	Insert horizontal rule	To insert a horizontal line, click **Insert horizontal rule** in the toolbar. On the screen that appears, enter the width and height for the line and select whether to include a shadow.
	**Insert custom characters**	To insert a special character, click **Insert custom characters**. The Custom characters screen appears. In the grid, select a character. The custom character appears at the selected location.

Button	Function	Description
	Insert anchor	To link to a specific location on a page, place your cursor at the link's endpoint (for example, a heading) and click **Insert anchor**. The Insert/edit anchor screen appears so you can enter a name for the anchor's location. The HTML editor adds before the defined location. In the normal view, the HTML editor displays an anchor symbol at the defined location. To link to the anchored location, in the HTML source view, append "#anchorname" to the end of the link.
	Insert image	To insert an image, click **Insert image**. On the Select Image from Image library screen, you can select the image.
	Insert link	To link text to a web address or web page, click **Insert link**. If the text is in a format that the program recognizes as a web address or page, such as www.abc123.org, the link formats automatically. Otherwise, the page link screen appears.
	Remove link	To remove a hyperlink from text, click **Remove link**. The text no longer acts as a hyperlink.
	Undo	To undo the last action in the content area, click **Undo**. The action is reversed. You can undo multiple actions.
	Redo	To redo an undone action in the content area, click **Redo**. The action is reinstated. You can redo multiple actions.
	Help	To access a description of the HTML editor features, click **Help**. The help file appears.
	Insert table	To insert a table, click **Insert table**. The Insert/edit table screen appears. For more information about option on this screen, see HTML Editor Table and Line Properties on page 37. After you create a table, you can select it and click **Insert table** to edit its properties.
	Delete table	To delete a table, select it and click **Delete table**.
	Row properties	To edit the properties of a row, select it and click **Row properties**. The row properties screen appears. For more information about row properties, see HTML Editor Table and Line Properties on page 37.
	Cell properties	To edit the properties of a cell, select it and click **Cell properties**. The cell properties screen appears. For more information about cell properties, see HTML Editor Table and Line Properties on page 37.
	Insert row above	To insert a row above a row in a table, click **Insert row above**. A new row appears.
	Insert row below	To insert a row below a row in a table, click **Insert row below**. A new row appears.
	Delete row	To remove a row from a table, click **Delete row**. The row is deleted.

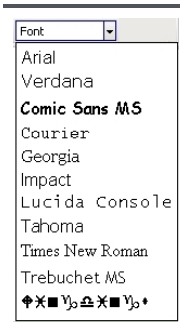
Button	Function	Description
	**Insert column to the left**	To insert a column to the left of a column in a table, click **Insert column to the left**. A new column appears.
	**Insert column to the right**	To insert a column to the right of a column in a table, click **Insert column to the right**. A new column appears.
	**Delete column**	To remove a column from a table, click **Delete column**. The column is deleted.
	**Split merged table cells**	To split a cell that spans multiple rows into two cells, click **Split merged table cells**. The selected cell no longer spans the row on the bottom.
	**Merge table cells**	To merge a cell with the cell to its right, click **Merge table cells**. Any content in the cell on the right is removed, and the selected cell now spans both columns.
	**Show table borders**	To hide or reveal the borders of your tables, click **Show table borders**.
	**Insert new layer**	To insert a layer, click **Insert new layer**. The HTML editor adds a layer using the <div> tag. To reposition the layer, select the layer and use the crossed arrows to drag the layer to the new location. To resize the layer, drag the resize handles found at the layer's corners or sides.
	Move layer forward	To move a layer forward, select the layer and click **Move layer forward**. The HTML editor increases the z-index number for the layer.
	Move layer backward	To move a layer backward, select the layer and click **Move layer backward**. The HTML editor decreases the z-index number for the layer.
	**Absolute positioning**	To apply absolute positioning to a selected layer, click **Absolute positioning**. The HTML editor adds the position: absolute tag to the layer and its location on the page in pixels. To remove absolute positioning from the selected layer, click **Absolute positioning** again.
	**Direction left to right**	To apply left to right directionality to all items in the division, click **Direction left to right**. For a left to right table, column zero is on the left side and row zero is at the top.
	**Direction right to left**	To apply right to left directionality to all items in the division, click **Direction right to left**. For a right to left table, column zero is on the right side and row zero is at the top.

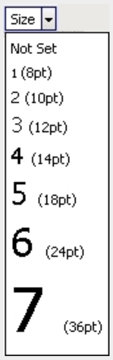
Button	Function	Description
	Block quote	To insert a long quotation, click **Block quote**. The HTML editor adds a <blockquote> tag around the selected text.
	Abbreviation	To add a tooltip that defines an abbreviation, select the word and click **Abbreviation**. The Abbreviation Element screen appears so you can enter the abbreviation's definition in the **Title** field and define formatting for the tooltip. The HTML editor adds an <abbr> tag around the selected word. When viewed in a browser, the abbreviation is underlined and a tooltip appears when you place your cursor over the underlined word. Screen readers read the abbreviation as a word, rather than spell out the letters.
	Acronym	To add a tooltip that defines an acronym, select the word and click **Acronym**. The Acronym Element screen appears so you can enter the acronym's definition in the **Title** field and define formatting for the tooltip. The HTML editor adds an <acronym> tag around the selected word. When viewed in a browser, the acronym is underlined and a tooltip appears when you place your cursor over the underlined word. Screen readers read the acronym as a word, rather than spell out the letters.
	Citation	To add an in-line citation or reference to another source, select the word or phrase and click **Citation**. The Citation Element screen appears so you can enter text in the **Title** field for the citation's tooltip (such as the author, book title, and page number (s) or a link to a website) and define formatting for the tooltip. The HTML editor adds a <cite> tag around the selected word or phrase. When viewed in a browser, the citation is usually italicized and the tooltip appears when you place your cursor over the italicized word or phrase.
	Bold	To make text bold, click **Bold**. The HTML editor adds a <strong> tag around the text.
	Italic	To italicize text, click **Italic**. The HTML editor adds an <em> tag around the text.
	Underline	To underline text, click **Underline**. The HTML editor adds a <u> tag around the text.
	Strikethrough text	To strike a line through text, click **Strikethrough text**. The HTML editor adds a <strike> tag around the text.
	Superscript	To strike a line through text, click **Strikethrough text**. The HTML editor adds a <strike> tag around the text.
	Subscript	To strike a line through text, click **Strikethrough text**. The HTML editor adds a <strike> tag around the text.
	Align left	To align text to the left, click **Align left**. The HTML editor adds an attribute of align=left to the division.
	Align center	To align text to the center, click **Align center**. The HTML editor adds an attribute of align=center to the division.

Button	Function	Description
	Align right	To align text to the right, click **Align right**. The HTML editor adds an attribute of align=right to the division.
	Align full	To fully justify text, click **Align full**. The HTML editor adds an attribute of align=justify to the division.
	Remove format	To remove formatting from text, click **Remove format**. The HTML editor removes any special format attributes, and the text appears as plain text.
	Text color	To change the color of text, click **Text color** and select a color from the palette. The HTML editor adds a <span> tag with the color around the text.
	Highlight	To highlight text, click **Highlight** and select a color for the highlight from the palette. The HTML editor adds a <span> tag with the background color around the text.
	Insert numbered list	To insert a numbered list, click **Insert numbered list**. The HTML editor adds an tag at the selected location. The items are numbered sequentially, starting with "1." To end a list, click **Insert numbered list** again.
	Insert unordered list	To insert a bulleted list, click **Insert unordered list**. The HTML editor adds an tag at the selected location. The items in the list have bullets. To end a list, click **Insert unordered list** again.
	Indent text	To increase an indent, click **Indent text**. The HTML editor adds a <blockquote> tag around the paragraph. If you increase the indent for a list item, the number or bullet changes to indicate a secondary relationship to the list.
	Outdent text	To decrease an indent, click **Outdent text**. The HTML editor removes the <blockquote> tag around the paragraph. If you decrease the indent of a list item, the text becomes plain text. If you decrease the indent of a secondary list item, the number or bullet becomes part of the parent list.
	Stylesheet options	To render content on a page, the program uses the stylesheet associated with the page's layout. To view your content with stylesheets applied and edit the content for a specific stylesheet, click **Stylesheet options**. On the Stylesheet Options screen, you can select the stylesheet to view and override the background and foreground colors of the HTML editor to improve readability. For more information about how to view content with stylesheets applied, see Style Sheet Options on page 36.

Button	Function	Description
	**Insert conditional content**	To add conditional content to an email message to customize the message for different types of recipients, click **Insert conditional content**. On the Conditional Content screen, you can create the first conditional content block. You can then define the content and select the group of recipients who view it. This button appears only on the add/edit screens for templates, messages, and newsletters. If you send an email message from *Blackbaud Direct Marketing*, this option does not appear.
	**View conditional content**	To verify that conditional content appears as expected for each group of recipients, click **View conditional content**. The View Message screen appears. This button appears only on the add/edit screens for templates, messages, and newsletters. If you send an email message from *Blackbaud Direct Marketing*, this option does not appear.
	Insert merge fields	To add merge fields with personalized information to the HTML content, click **Insert merge fields**. For more information, see Merge Fields on page 35.
	Insert content placeholder	On the add or edit layout screen, you can click **Insert content placeholder** to add panes for parts to the layout. A yellow icon appears as a placeholder for a pane. When you create templates and web pages, a pane contains multiple parts. You select the parts to appear in the pane.

Menus on the Toolbar

<table>
<tr><th>Menu</th><th>Menu name</th><th>Description</th></tr>
<tr><td>
</td><td>Font menu</td><td>This menu lists common fonts that appear correctly on most web browsers. To change the font applied to text, select a font.</td></tr>
</table>

Menu	Menu name	Description
	Size menu	To change the size of text, select a size from this menu.
	Paragraph menu	To apply a paragraph tag to text, select a format from this menu. For example, select “Normal” for body text.

Merge Fields

To create personalized content, use merge fields to display offline information. For example, in an email, you can insert the **First name** merge field so it displays “Hello, <First name>” to the recipient.

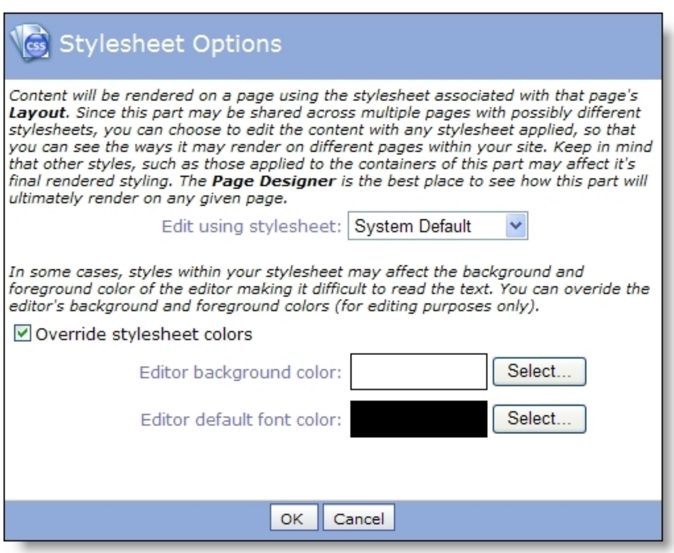
- To add merge fields, click **Merge fields** on the Insert tab in the HTML editor toolbar. The merge fields list appears in a separate window that you can move around.
- To view the available fields, click the plus sign next to a group of fields to expand the list.
- You can double-click or drag and drop merge fields from the window to the content area.
- You can add multiple fields at a time. To do this, place your cursor to the left or right of the group name or fields (not over the group or fields) and click and drag your mouse to select them. After the fields are selected, you can drag them as a group to the content area.

Style Sheet Options

On your website, the program uses the style sheet associated with a web page's layout to render the content you enter in the HTML editor. Because the part on which you enter the HTML content may be shared across multiple web pages with different style sheets, you may need to edit the content as necessary to improve its readability with a specific style sheet. When you use the HTML editor in the normal view, you can view the content as it appears with different style sheets applied.

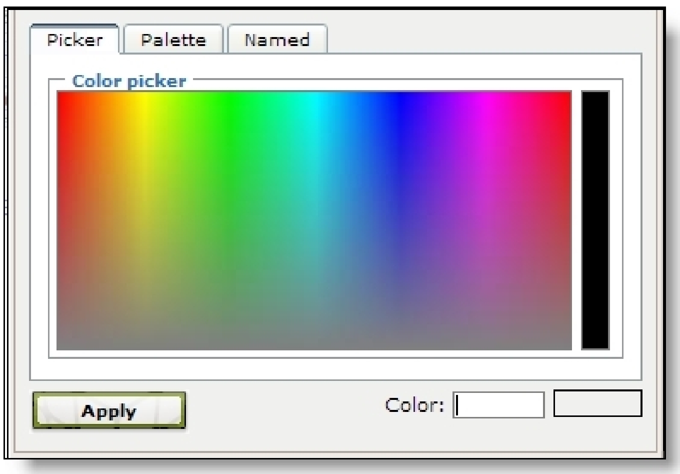
View HTML content with a specific style sheet applied

1. On the View tab in the HTML editor toolbar for formatted text and images parts, click **Style sheet options**. The Style sheet Options screen appears.



2. In the **Edit using style sheet** field, select the style sheet to apply to the content in the HTML editor.
3. Depending on the style sheet, the background and foreground colors of the HTML editor may affect the readability of your text. Change the background and foreground colors of the HTML editor as necessary to edit the content.
   a. Select **Override style sheet colors**.
   b. Select the color to adjust. For the background color, click **Select** next to **Editor background color**. For the foreground color, click **Select** next to **Editor default font color**.

   The Select a color screen appears. Using the tabs, you can pick a color three different ways or enter its hexadecimal value in the **Color** field.



   c. Click **Apply**. You return to the Style sheet Options screen.
4. Click **OK**. You return to the HTML editor. The content appears with the selected style sheet and colors applied.

HTML Editor Table and Line Properties

In the normal view, you can use the HTML editor to design tables, table rows, table cells, and horizontal lines that divide the web page. You can also adjust the properties for these items to determine characteristics such as size, styles, and color.

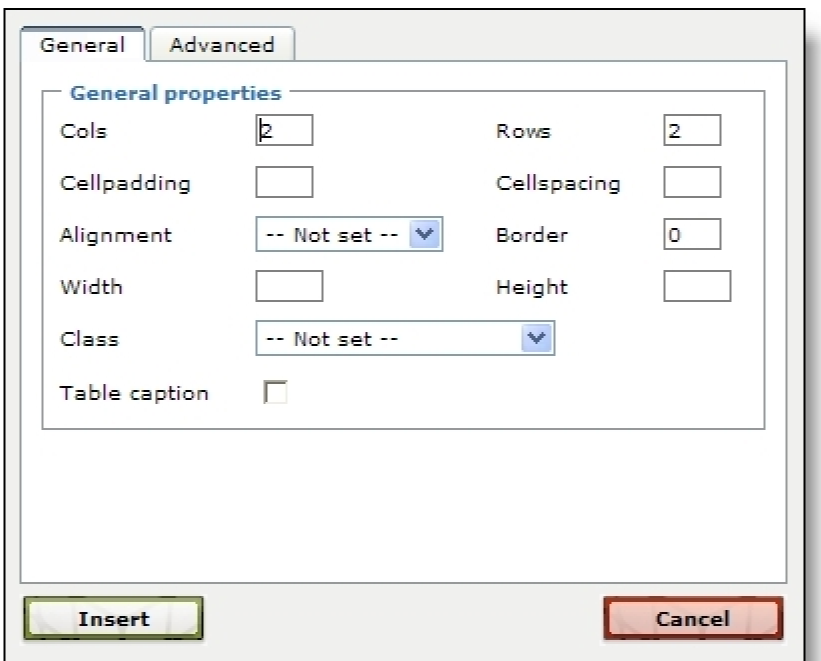
- To create a table, click **Table** on the Insert tab in the HTML editor toolbar. The Insert/Edit Table Screen appears. On the General and Advanced tabs, you can design the table and adjust its properties. We recommend only users familiar with HTML and CSS style elements adjust the properties on the Advanced tab. For more information, seeInsert/Edit Table Screen on page 38Insert/Edit Table Screen on page 38.
- To edit the properties of a row in a table, select the row and click **Row properties** on the Table tab in the toolbar. The Table Row Properties screen appears. On the General and Advanced tabs, you can design the row and adjust its properties. We recommend only users familiar with HTML and CSS style elements adjust the properties on these tabs. For more information, see Table Row Properties Screen on page 40.

- To edit the properties of a cell in a table, select the cell and click **Cell properties** on the Table tab in the toolbar. The Table Cell Properties screen appears. On the General and Advanced tabs, you can design the cell and adjust its properties. We recommend only users familiar with HTML and CSS style elements adjust the properties on these tabs. For more information, see Table Cell Properties Screen on page 42.
- To insert a horizontal line, click **Horizontal ruler** on the Insert tab in the toolbar. On the screen that appears, enter the width and height for the line and select whether to include a shadow.

Insert/Edit Table Screen

To create a table, click **Table** on the Insert tab in the HTML editor toolbar. The Insert/Edit Table Screen appears. On the General and Advanced tabs, you can design the table and adjust its properties. We recommend only users familiar with HTML and CSS style elements adjust the properties on the Advanced tab. After you create a table, you can select the table and click **Table** to edit its properties.

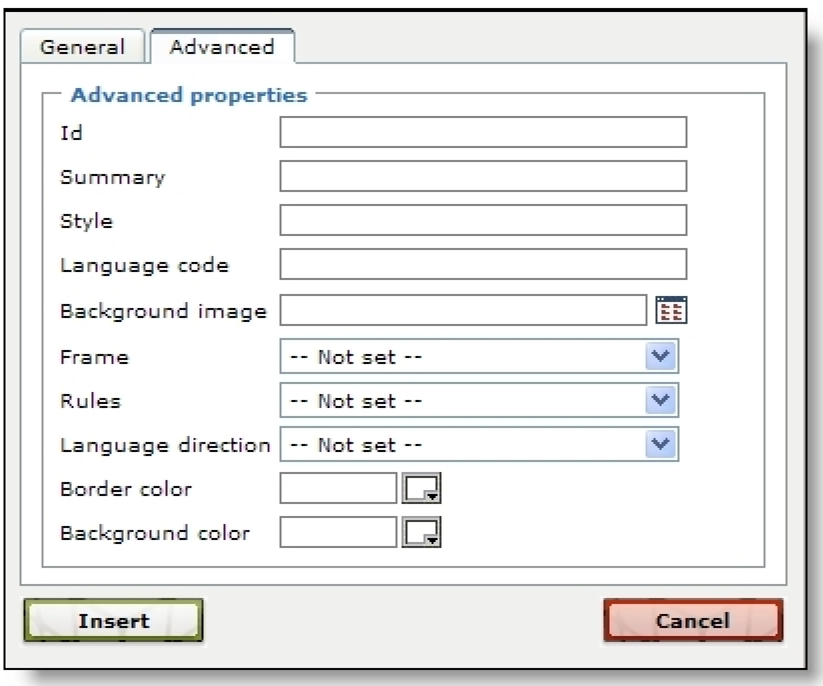
General Tab



Screen Item	Description
Cols	Enter the number of columns.
Cellpadding	Enter the amount of space to appear between the ruled line and the content of a cell in the table.
Alignment	Select the horizontal alignment of the table. You can select Left, Center, Right, or Not Set.

Screen Item	Description
Width	Enter the pixel dimensions to use for the cells.
Class	Select the CSS class to apply.
Table caption	Select this checkbox to display a caption at the top of the table. To remove the table caption, clear the checkbox or delete its code in HTML mode.
Rows	Enter the number of rows.
Cellspacing	Enter the amount of space to appear between cells of the table.
Border	Enter the width, in pixels, of a border around the table. To display the table with no border, enter "0."
Height	Enter the pixel dimensions to use for the cell.

Advanced Tab



Screen Item	Description
ID	Enter a unique identifier for the table.
Summary	Enter a summary of the table, such as for speech-synthesizing or non-visual browsers.
Style	Enter the CSS class to apply to the table.

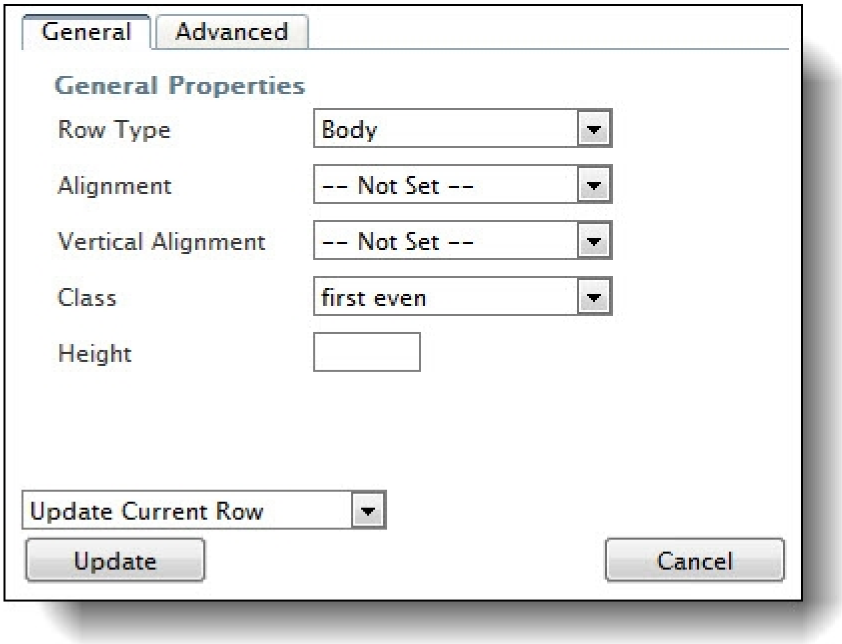
Screen Item	Description
Language code	Enter the language code for text in the table, such as “en-US” for United States English. This allows the browser to render content more meaningfully based on accepted cultural practice for the specified language, such as applying correct punctuation and assisting screen readers and search engines.
Background image	To insert an image that appears as the background of the table or cell, click **Browse** to open the *Image library* and select an image.
Frame	Select this checkbox to display a caption at the top of the table To remove the table caption, clear the checkbox or delete its code in HTML mode.
Rules	Select which ruled lines appear between cells of the table. You can select to display all lines, no lines, or only those between rows, columns, or groups.
Language direction	Select the directionality for text in the table — left to right or right to left.
Border color	Enter the color for the border of the table. You can enter the standard color name or hexadecimal value, or click **Browse** to select the color from the palette.
Background color	Enter the color for the background of the table. You can enter the standard color name or hexadecimal value, or click **Browse** to select the color from the palette.

Table Row Properties Screen

To change the properties of rows in the table, select a row and click **Row properties** on the Table tab in the HTML editor toolbar. The Table Row Properties screen appears. We recommend only users familiar with HTML and CSS style elements adjust the properties on the Advanced tab.

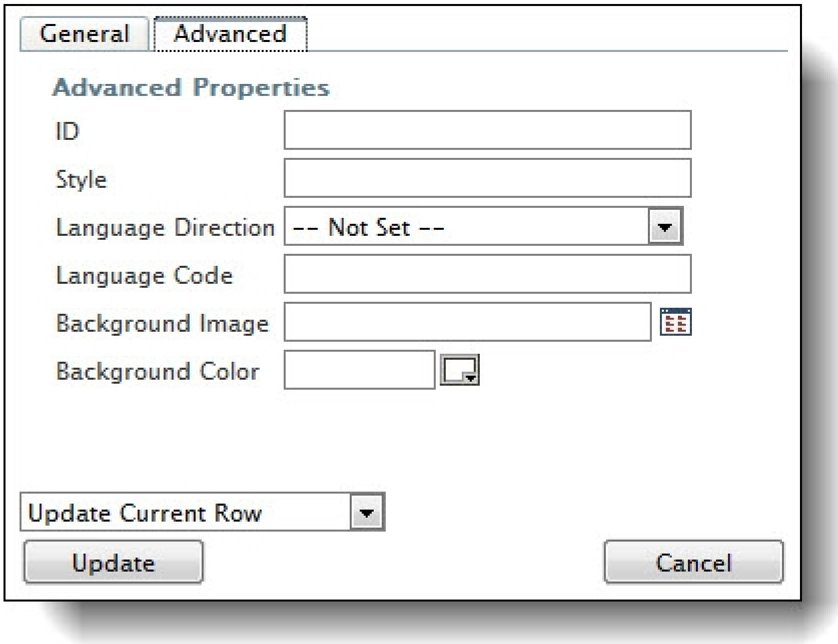
Use the field at the bottom of the screen to select which rows to update with changes — the current row, odd rows in the table, even rows in the table, or all rows in the table.

General Tab



Screen Item	Description
Row type	Select Header, Body, or Footer for the row type.
Alignment	Select the horizontal alignment of the row. You can select Left, Center, Right, or Not Set.
Vertical alignment	Select the vertical alignment of the row. You can select Top, Center, Bottom, or Not Set.
Class	Select the CSS class to apply to the row.
Height	Enter the pixel dimensions to use for the row height.

Advanced Tab



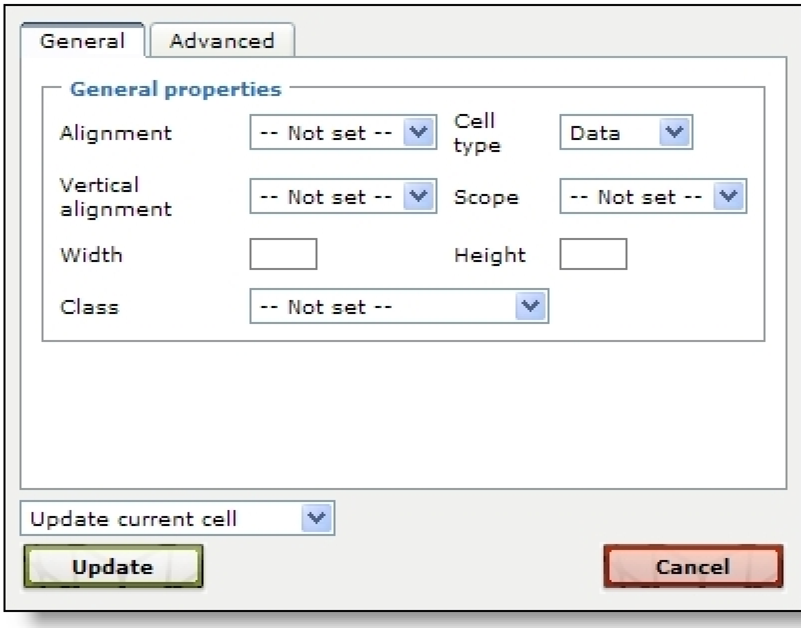
Screen Item	Description
ID	Enter a unique identifier for the row.
Style	Enter the CSS class to apply to the row.
Language direction	Select the directionality for text in the row — left to right or right to left.
Language code	Enter the language code for text in the row, such as "en-US" for United States English. This allows the browser to render content more meaningfully based on accepted cultural practice for the specified language, such as applying correct punctuation and assisting screen readers and search engines.
Background image	To insert an image that appears as the background of the row, click **Browse** to open the *Image library* and select an image.
Background color	Enter the color for the background of the row. You can enter the standard color name or hexadecimal value, or click **Browse** to select the color from the palette.

Table Cell Properties Screen

To change the properties of cells in the table, select a cell and click **Cell properties** on the Table tab in the HTML editor toolbar. The Table cell properties screen appears. We recommend only users familiar with HTML and CSS style elements adjust the properties on the Advanced tab.

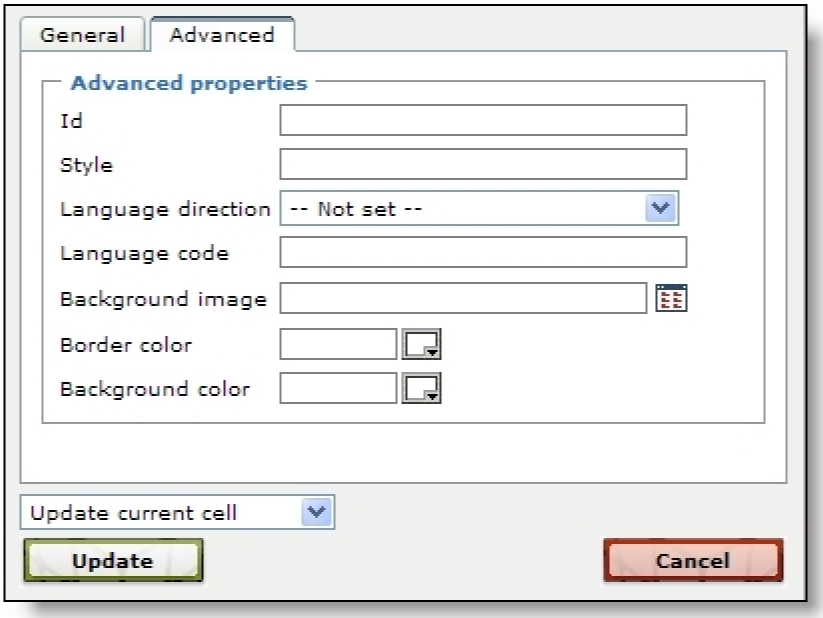
Use the field at the bottom of the screen to select which cells to update with changes — the current cell, all cells in the row, all cells in the column, or all cells in the table.

General Tab



Screen Item	Description
Alignment	Select the horizontal alignment of the cells You can select Left, Center, Right, or Not Set.
Vertical alignment	Select the vertical alignment of the cells You can select Top, Center, or Bottom.
Width	Enter the pixel dimensions to use for the cell width.
Class	Select the CSS class to apply to the cell.
Cell type	Select whether the cell is a header for a column or includes data.
Scope	Select whether the cell type applies to the column, row, group of columns, or group of rows.
Height	Enter the pixel dimensions to use for the cell height.

Advanced Tab



Screen Item	Description
ID	Enter a unique identifier for the cell.
Style	Enter the CSS class to apply to the cell.
Language direction	Select the directionality for text in the cell — left to right or right to left.
Language code	Enter the language code for text in the cell, such as “en-US” for United States English. This allows the browser to render content more meaningfully based on accepted cultural practice for the specified language, such as applying correct punctuation and assisting screen readers and search engines.
Background image	To insert an image that appears as the background of the cell, click **Browse** to open the *Image library* and select an image.
Border color	Enter the color for the border of the cell. You can enter the standard color name or hexadecimal value, or click **Browse** to select the color from the palette.
Background color	Enter the color for the background of the cell. You can enter the standard color name or hexadecimal value, or click **Browse** to select the color from the palette.