# Blackbaud Internet Solutions
# Service Pack 20

# New Features Guide

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# New Features

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This chapter provides an overview of new features and enhancements for Blackbaud Internet Solutions 4.0. For information about how to install or update to this version, see the *Infinity Platform Installation and Upgrade Guide*.

## Internet Explorer 11 Support

Blackbaud Internet Solutions now includes administrative and website browser support for *Internet Explorer 11* (*IE11*). For example, you can use *IE11* to create a web page from *Site explorer*, *Pages & templates*, and a website user can use it to access the page on your site.

To support the full-page functionality testing that is required for the new browser, *Internet Explorer 8* is no longer supported.

***Note:*** When you use non-supported browsers, you can still log in and use the program and website pages, but some features may not render correctly.

For a full list of supported browsers, refer to the System Requirements.

# Image Library

To help support profile image enhancements in this version and to provide better image search functionality, the new **Image owner** field now appears on the Search tab in *Image library*. Use this field to search for an image by the owner's first name or last name. The image owner is the person who originally uploaded the image to your website. These images may have been uploaded by someone at your organization for a web page or they may have been uploaded by a website user for a profile page.

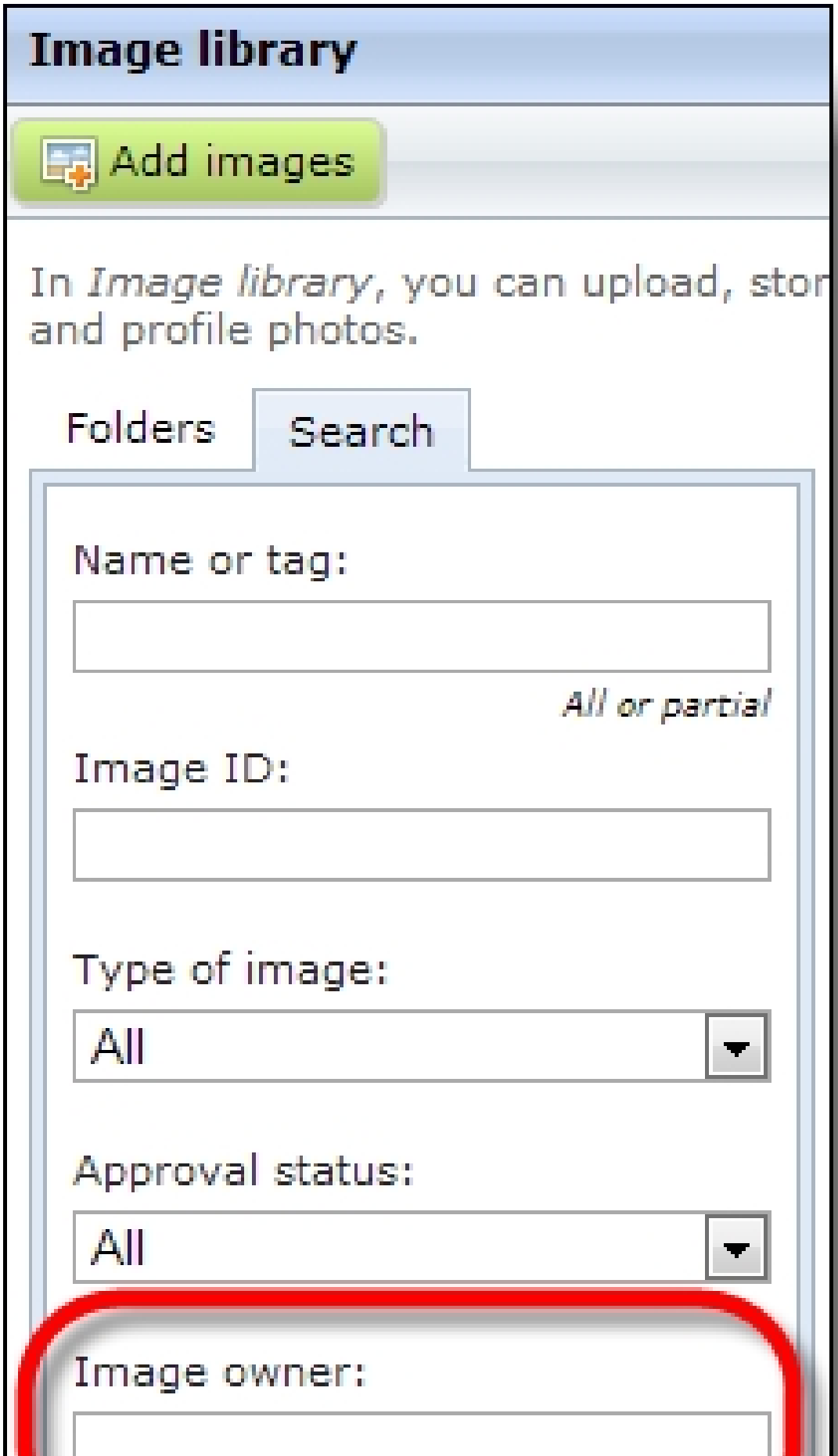


Image library
Add images
In Image library, you can upload, stor
and profile photos.
Folders
Search
Name or tag:
All or partial
Image ID:
Type of image:
All
Approval status:
All
Image owner:

***Note:*** For more information about the profile image enhancements, see Profile Form on page 1.

Learn more about the Image library

# Blackbaud Secure Payment API

***Blackbaud Internet Solutions*** includes new API endpoints that allow custom parts to use Blackbaud's secure payment page. For example, a customization can pre-populate the Blackbaud secure payment page with biographical information entered on the custom part to improve data entry speed for donors. A customization can also store a donor's credit card information.

***Note:*** The Blackbaud secure payment offers additional flexibility, but comes with additional complexity. If you host your own website, we strongly recommend only developers knowledgeable in all areas of customizations design this page. This includes using endpoints, objects, and the API, as well as writing HTML and JavaScript code. Users without this expertise should not design this page. For information about the API, see the Developer Guide. If Blackbaud hosts your website, customizations can only be completed by Blackbaud or one of our designated partners. For more information, please contact your Blackbaud Account Executive.

The following end points are now available.

- AmountAsCurrency
- ApplicationIdentifier
- ApplicationPreferredName
- Note
- Source As TransactionSource
- Transaction
- VerificationMethod As VerificationMethod

In ***Blackbaud Internet Solutions*** 3.0 service pack 5, the following endpoints were added to support this functionality.

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

# Parts

The following *Parts* enhancements are available.

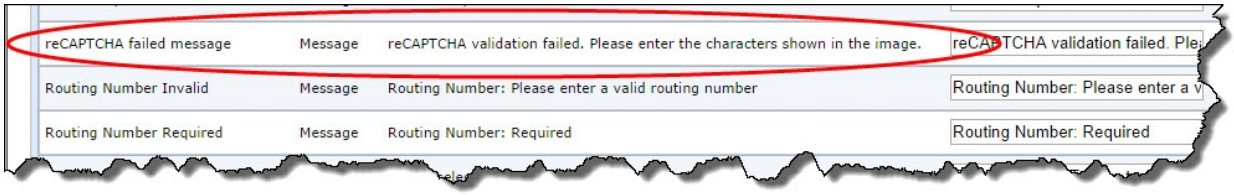
# Language Tab Changes

Updates to the Language tab include a new default message for incorrect reCAPTCHA entries on forms and an option to change the default value that appears in drop down fields.

***Note:*** For information about updates to the Language tab for the Donation Form and Payment 2.0 parts, refer to Donation Form on page 1 and Payment 2.0 on page 1.

## reCAPTCHA Failed Message

The default message that appears when website users enter incorrect values for reCAPTCHA images on forms is changed. Previously, the message instructed users to enter "the words" shown in the reCAPTCHA image. Now, the message instructs them to enter "the characters" since the images typically include both text and numerical values.




To change the new default message, navigate to the Language tab on the parts that include reCAPTCHA and update the text in the **reCAPTCHA failed message** row.

This table lists the Language tab category for each part that includes the row.

| Part | Category |
|---|---|
| Donation Form | Validation Messages |
| eCards | reCAPTCHA |
| Payment | Validation Messages |
| Payment 2.0 | Validation Messages |
| User Login | reCAPTCHA |

## Default Value for Drop Down Fields

A new **Default value for drop down fields** option is available on the Language tab so you can specify the text that appears when no value is selected for a field. Previously, <Please Select> always appeared as the default value, regardless of a page's language setting.

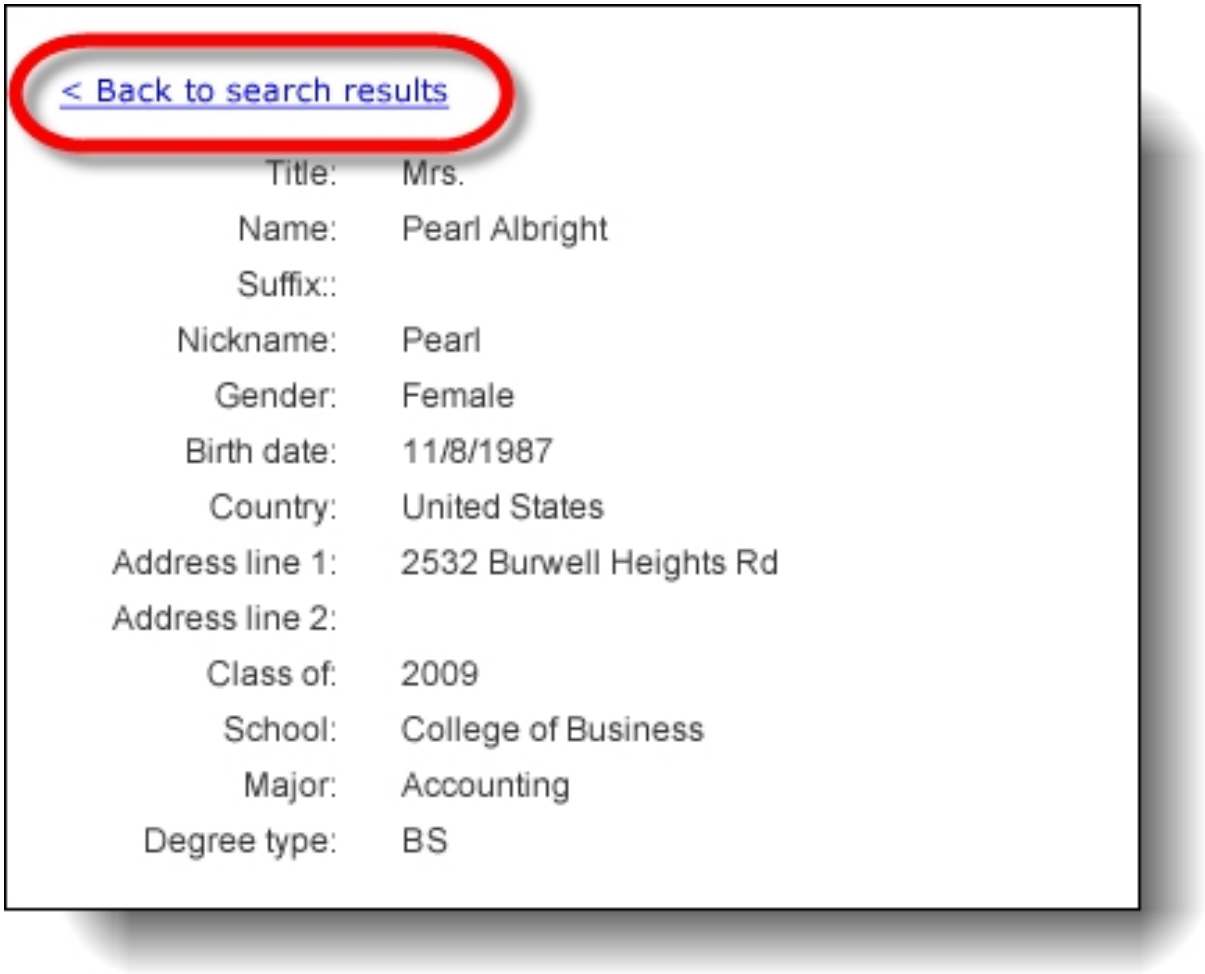
This table lists the category where the option appears for each part.

| Part | Category |
|---|---|
| Donation Form | Donation Information |
| Event Registration Form | Registration |
| User Login | Registration Form |

# Directory

***Show Me:*** Review the walkthrough to learn more

When website users open profile pages from Directory part search results, a new **Back to search results** link appears at the top. Users click the link to return to the directory and view their search criteria and results.

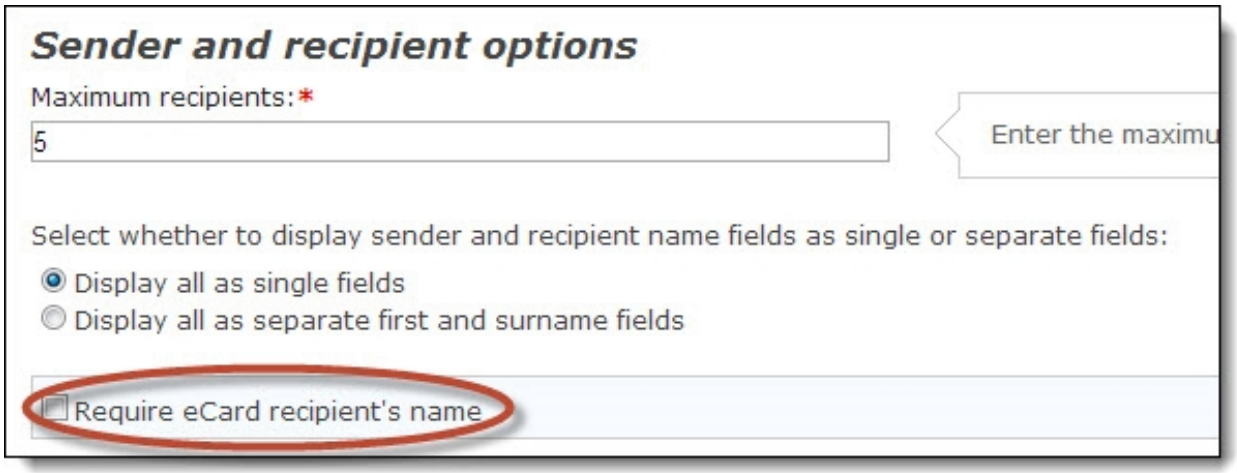


This website usability enhancement eliminates the need for users to click menu links or the browser back button to return to the directory page. It also saves users time from entering search criteria again.

***Note:*** This link does not appear for Chapter Manager part directories.

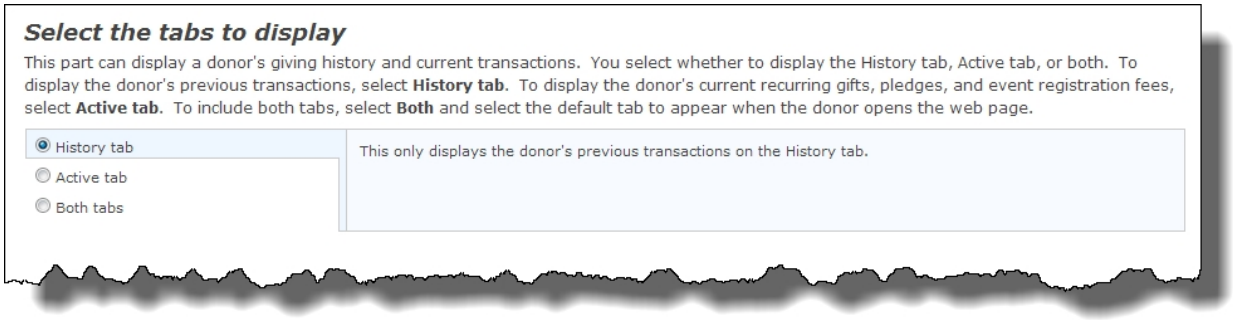
# eCards

A new **Require eCard recipient's name** field appears on the eCards part to prevent blank values in merge fields that you add to eCard messages. When you select this option, the program requires website users to enter a value for **First name**.

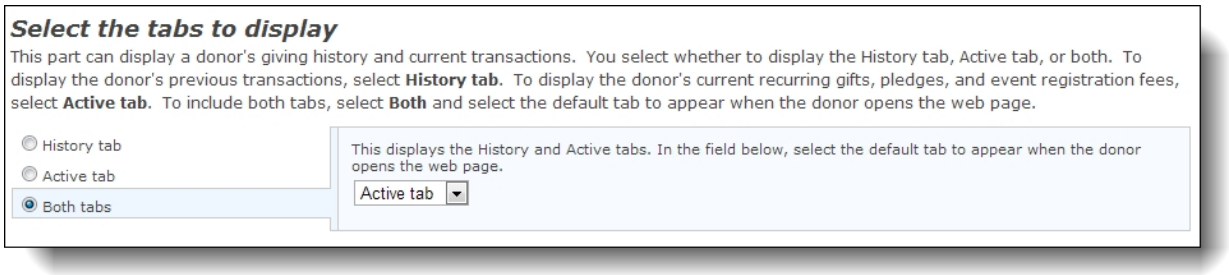



# Transaction Manager

When you design a Transaction Manager part, the **Select the tabs to display** section now appears so you can select whether to display only the History or Active tabs on your website.

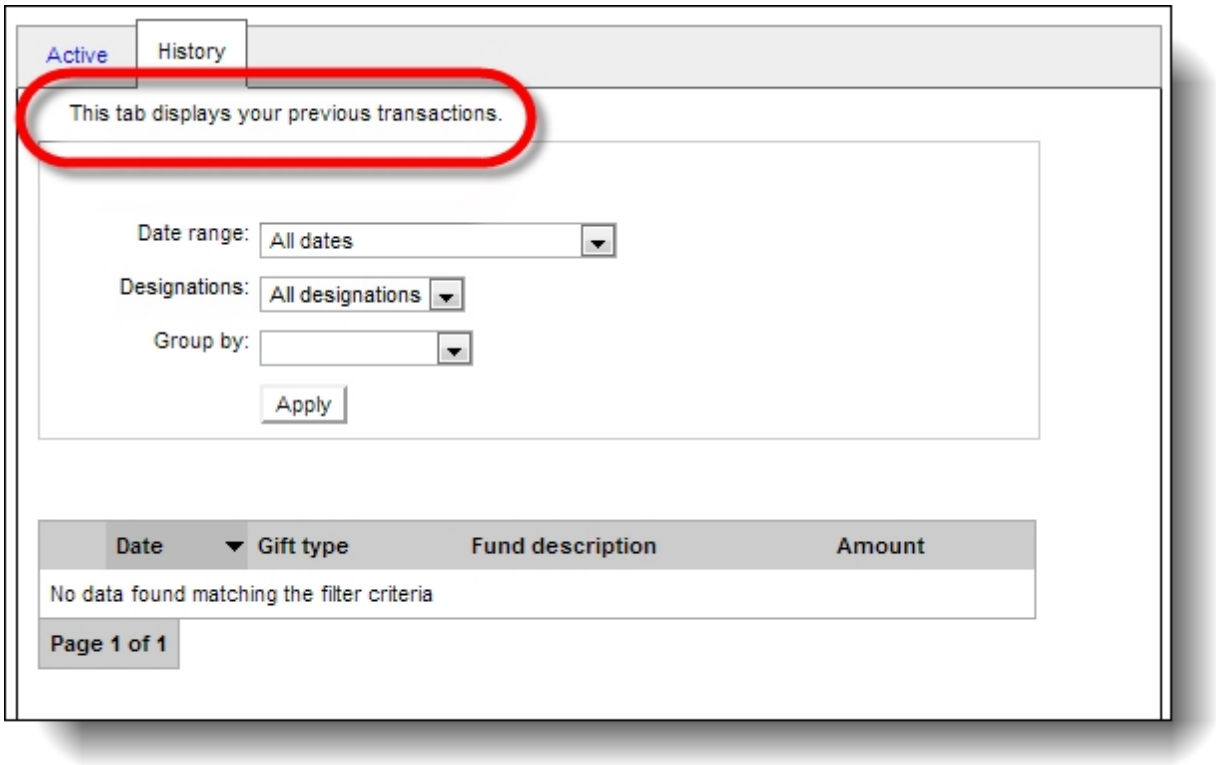



To display both tabs on your site, you can select **Both tabs**. When you do this, a field appears on the right for you to select the tab to display when users first access the part on a page.




***Tip:*** When you upgrade to this version, both tabs continue to appear on your site and the Active tab still displays first.

In addition, the Language tab text you enter in the "Transaction Manager - Help Text" category to clarify each tab's purpose to users now appears at the top of the tab.



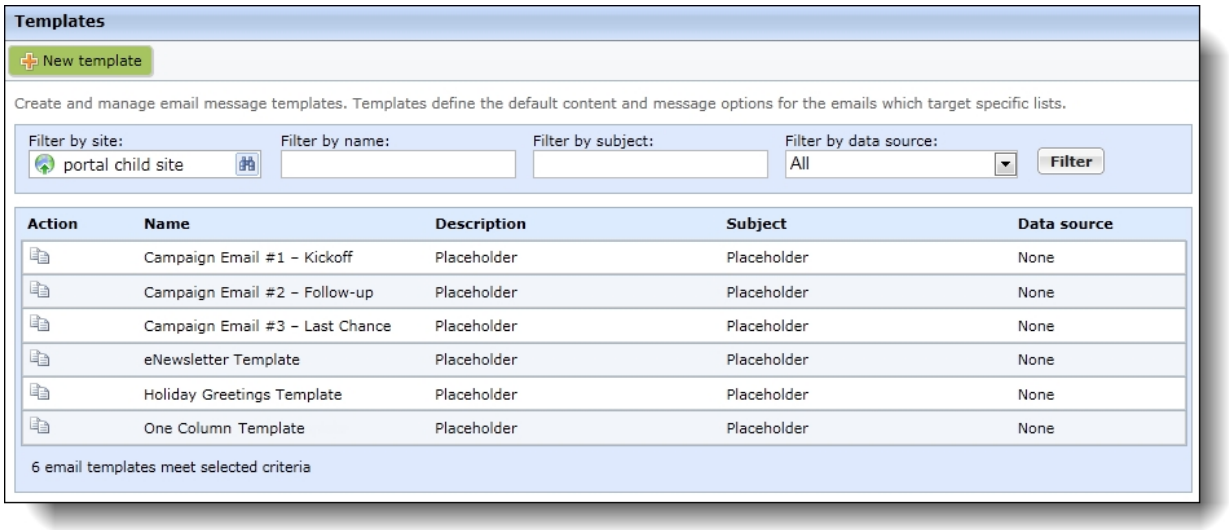

These improvements were made to provide additional flexibility with the part based on your organization's needs and preferences. For example, if you did not want the Active tab to appear in the past, you can now remove it. If you want both tabs to appear, but prefer the History tab appears first, you can now select to do this.

Learn more about the Transaction Manager

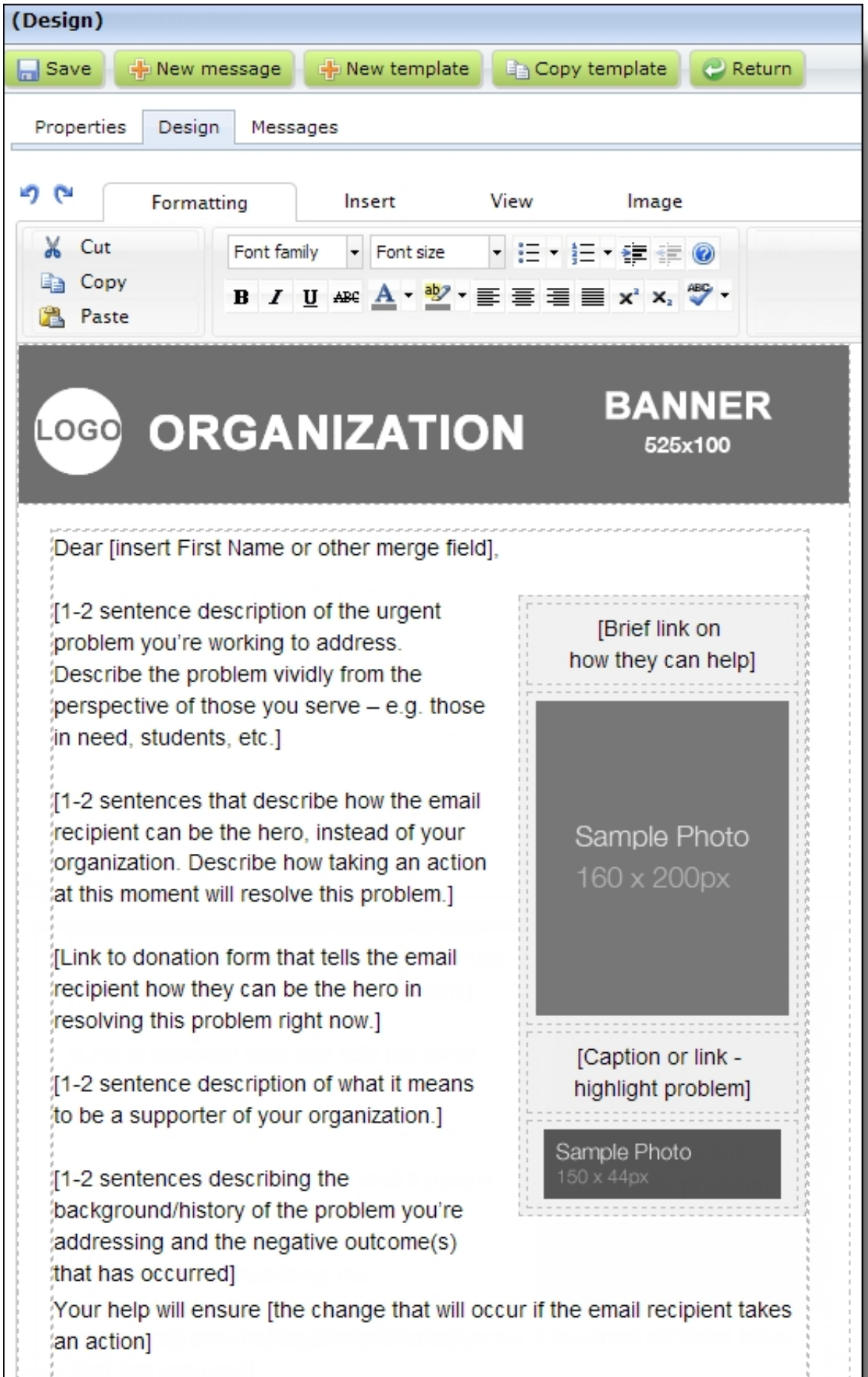
# Email Templates

***Show Me:*** Review the walkthrough to learn more

To improve email marketing for mobile users, six new mobile friendly email templates are available for you to copy and use as new templates. These templates are more narrow in width and include larger fonts for improved usability on mobile devices. They also render more consistently across mobile devices, browsers, and desktop and web-based email programs. You can easily identify these in the email templates grid by viewing templates with "Placeholder" in the **Description** column.




To copy a mobile friendly template, select the one you need. In the **Action** column, click **Click here to copy this email template**. After you copy it, update all placeholder text with your unique content in the new email template. For example, you can replace the merge field placeholder text with merge fields in the HTML editor. You can also replace the sample logo banner with your organization's logo banner.


(Design)
Save
New message
New template
Copy template
Return
Properties
Design
Messages
Formatting
Insert
View
Image
Cut
Copy
Paste
Font family
Font size
LOGO
ORGANIZATION
BANNER
525x100
Dear [insert First Name or other merge field],
[1-2 sentence description of the urgent problem you're working to address. Describe the problem vividly from the perspective of those you serve – e.g. those in need, students, etc.]
[1-2 sentences that describe how the email recipient can be the hero, instead of your organization. Describe how taking an action at this moment will resolve this problem.]
[Link to donation form that tells the email recipient how they can be the hero in resolving this problem right now.]
[1-2 sentence description of what it means to be a supporter of your organization.]
[1-2 sentences describing the background/history of the problem you're addressing and the negative outcome(s) that has occurred]
[Brief link on how they can help]
Sample Photo
160 x 200px
[Caption or link - highlight problem]
Sample Photo
150 x 44px
Your help will ensure [the change that will occur if the email recipient takes an action]

Below is a list of the six mobile friendly email templates. To secure the content in the templates, you cannot edit or delete them.

- Campaign Email #1 – Kickoff
- Campaign Email #2 – Follow-up
- Campaign Email #3 – Last Chance
- eNewsletter Template
- Holiday Greetings Template
- One Column Template

***Tip:*** One copy of each mobile friendly email template exists in the program. When you host multiple websites, you access them in each site's *Templates* area.

Learn more about the email templates

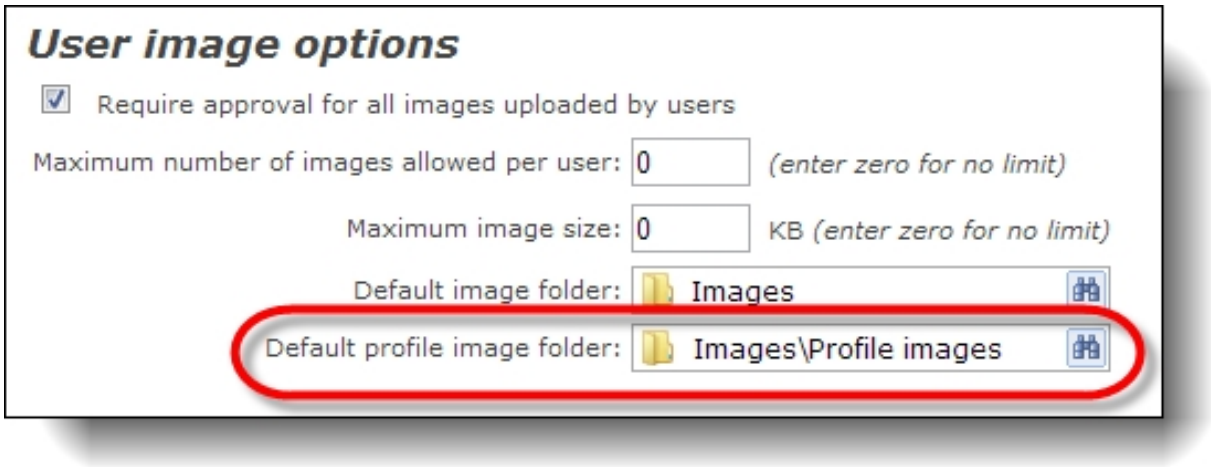
# Administration

The following *Administration* enhancements are available.

## User Image Options Setting

To help support the profile image enhancements and so you can improve how you organize images, a new **Default profile image folder** field now appears in site settings for images. In this field, select the default folder profile images upload to in *Image library*.

***Note:*** For more information about the profile image enhancements, see Profile Form on page 1.



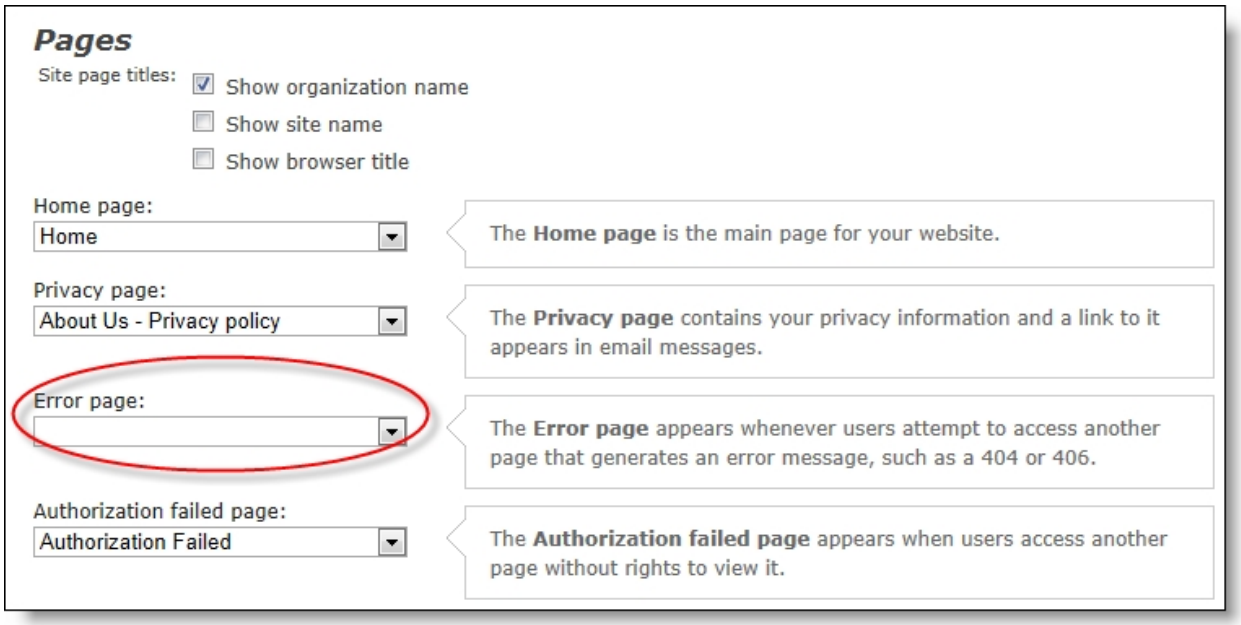

When you select **Require approval for all images uploaded by users**, you must approve each profile image in the *Image library* before it appears on your website. Until you do this, it only appears for the user who uploads it.

Learn more about image settings

# Custom Error Page

***Show Me:*** Review the walkthrough to learn more

In *Sites & settings*, a new **Error page** field is available under **Pages** on the Settings tab for default, parent, and child sites. In the field, you select a web page from *Pages & templates* to appear if errors occur.




This allows you to create a custom message and include information to help identify the causes of errors.

***Note:*** If you do not select an error page, system messages from *Internet Information Service (IIS)* appear when errors occur.

To provide detailed information in the message, use the new error merge fields in a Formatted Text and Images part. The merge fields insert responses from the website server if pages do not load properly. The error merge fields include:

- Error code — The numeric portion of a standard response code, such as 404 or 406.
- Error description — The reason for a standard response code, such as not found or not acceptable.
- Error log ID — The database number that corresponds to the server error.

  ***Note:*** Error log IDs help Blackbaud Support track the reasons for errors on your website.

Learn more about the custom error setting

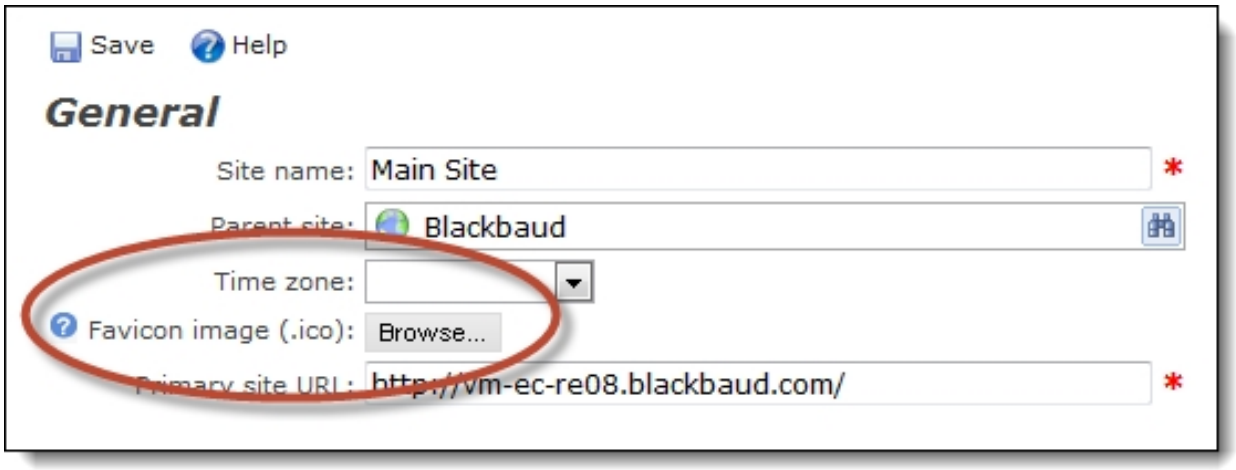
# Favicon Images

***Show Me:*** Review the walkthrough to learn more

You can now add branding to your web address so users can quickly associate it with your organization. Use the new **Favicon image** field in general site settings to select a small icon to represent your website. The image appears in browser address bars and locations where users save your website URL, such as browser favorite lists.

To add a custom favicon to your site, click **Browse** beside the **Favicon image** field and select an .ico image file. We recommend you upload a 16x16 or 32X32 pixel image for maximum display quality in modern browsers on desktop and mobile platforms. 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.




Previously, websites rendered favicons in browser address bars only when an .ico file was sized and saved in *Image library*.

***Tip:*** If Blackbaud hosts your website, we recommend you add a favicon image to prevent issues when there are environment changes.

# Forms

The following *Forms* enhancement is available. For more information, see the *Forms Guide*.

## Communication Preferences Form: Active Email Addresses

When you include the **General Correspondence** element on a Communication Preferences form, only active email addresses now appear. Previously, the element included inactive email addresses but not inactive mailing addresses. This change creates consistency between the email and mailing address behavior.

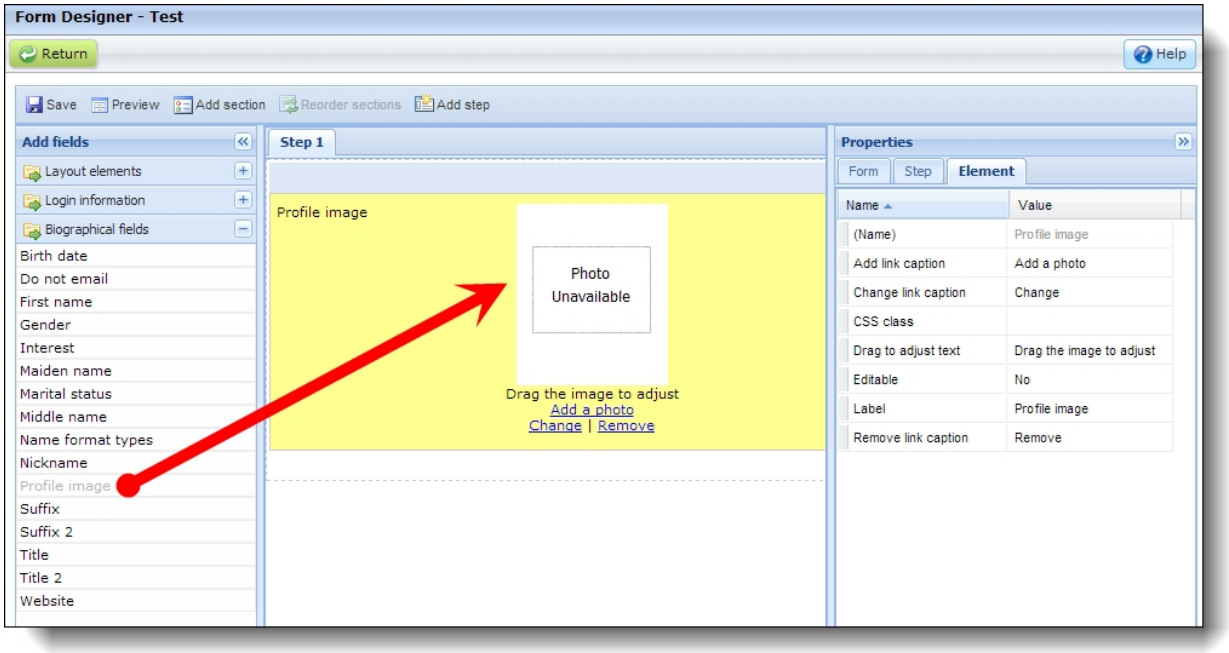
***Tip:*** To ensure correct email addresses appear on forms, we recommend you properly maintain historical dates on email addresses.

# Profile Update Form

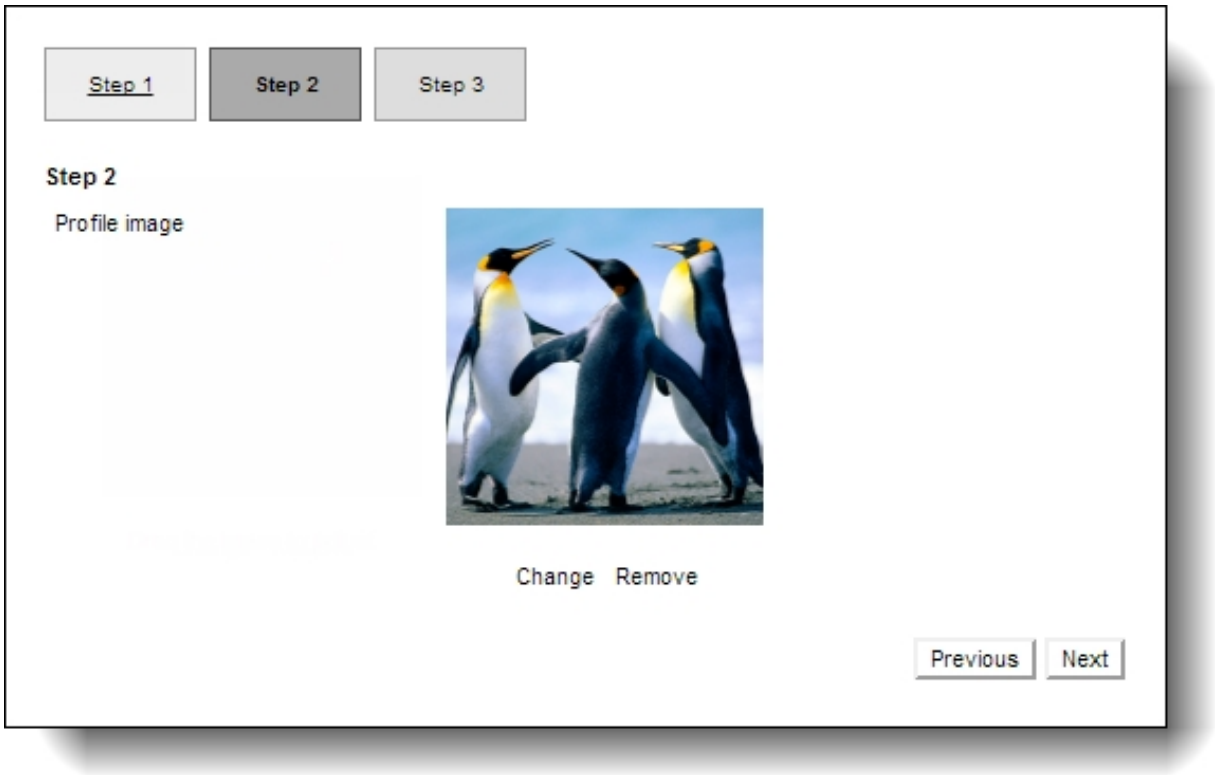
***Show Me:*** Watch a video about the new profile image enhancements and review the walkthrough to learn more.

To simplify profile image management for your organization and improve the website user experience for profile images, the Profile Update Form now includes a **Profile image** element. When you include this in the design area, you provide the ability for website users to easily add, edit, or remove profile images.

***Note:*** When you implement this new profile image feature, the program automatically uses the most recent profile image for a user as the current profile image.

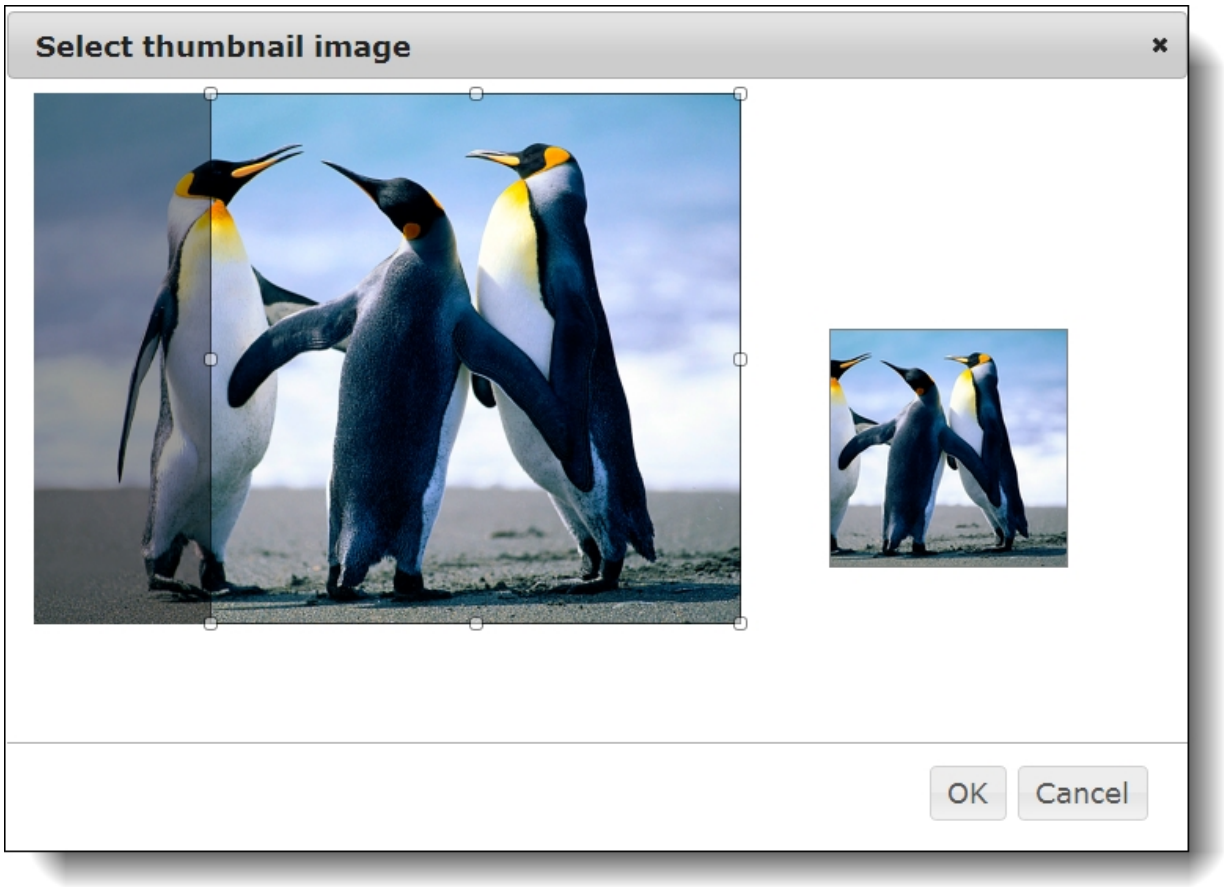



When a profile image displays on a profile web page, a square thumbnail of the user's image appears. The user can change or remove the image by clicking the links below it.




***Note:*** When a website user has an existing profile image and uploads a new one on the profile page, the new profile image overwrites the previous image. This occurs on your website and in *Image library*.

To select the portion of it that appears as the profile, the user clicks the thumbnail image. On the screen that appears, the user drags the box to highlight the portion of the image to display and a thumbnail example appears on the right.




Before a user uploads a profile image, a default silhouette image appears as the profile. A link to add an image appears below the silhouette.

***Tip:*** To help support the profile image enhancements and improve how you organiz and search for profile images, there are additional new features in *Image library* and *Administration*. For more information, seeImage Library on page 9 andUser Image Options Setting on page 18.

## User Photos Form

Previously, profile images saved as a profile image type when they were uploaded on the User Photos Form part. With this release and the profile image enhancements on the Profile Update Form, images uploaded on the User Photos Form save as a personal type. You can design these images to display on the web page with the profile image from the Profile Update Form.

***Warning:*** After you implement the new profile image on the Profile Update Form, we recommend you remove any User Photos Form parts that display profile images. If you do not remove them from your website, you risk inadvertently overwriting profile images. The most recent image uploaded by users remains as the current profile image automatically when you use the new profile image. Therefore, you can remove these User Photos Form parts from your site.

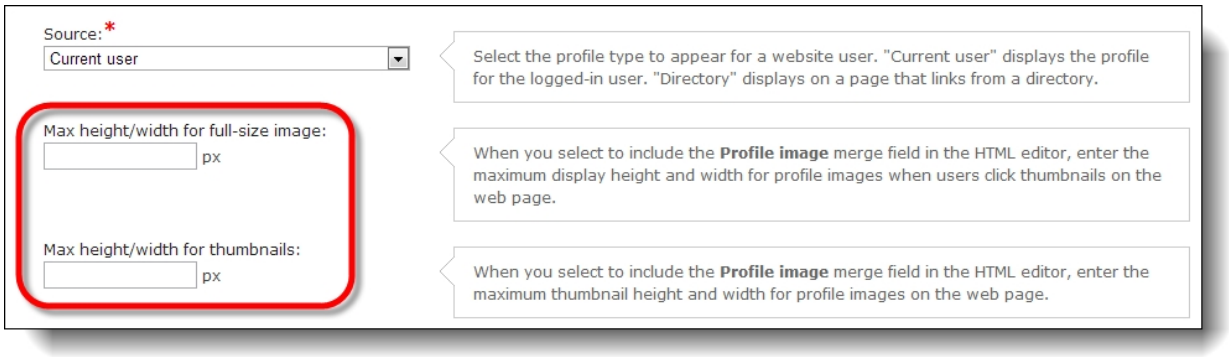
When an image's tag is the same as the tag selected on the User Photos Form part, the image displays on the page regardless if the image type is personal or profile. Previously, only profile image types displayed. To view personal and profile image types in your database, in *Image library*, select the type to view in the **Type of image** field on the Search tab. You can view the tags for an image on its properties.

Learn more about the User Photos Form

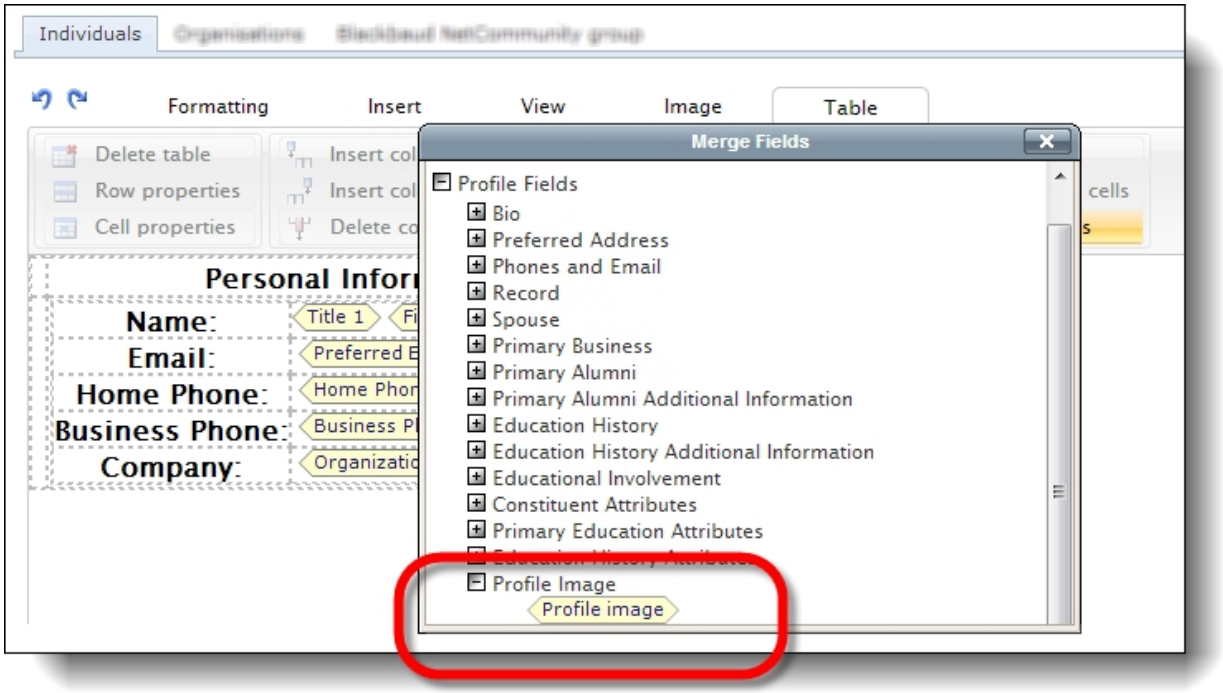
# Profile Display

As a part of the profile image management enhancements, the Profile Display part now includes a **Profile image** merge field in the HTML editor and height and width fields for you to configure maximum profile image sizes.

In the **Max height/width for full-size image** field, you enter the maximum display height and width for full-size profile images that display when users click thumbnails on the web page. In the **Max height/width for thumbnails** field, you enter the maximum height and width for profile image thumbnails on the web page.




The HTML editor includes the **Profile image** merge field on the Individual tab. To display the image a user uploads on the Profile Update Form, include this merge field in the design box.



When you do this, the image appears on the read-only profile display web page for other website users to view. The square cropped image that a user selects on the Profile Update Form displays as the profile image thumbnail. When website users click the thumbnail, the full-size image displays.

Learn more about Profile Display

# Service Pack New Features

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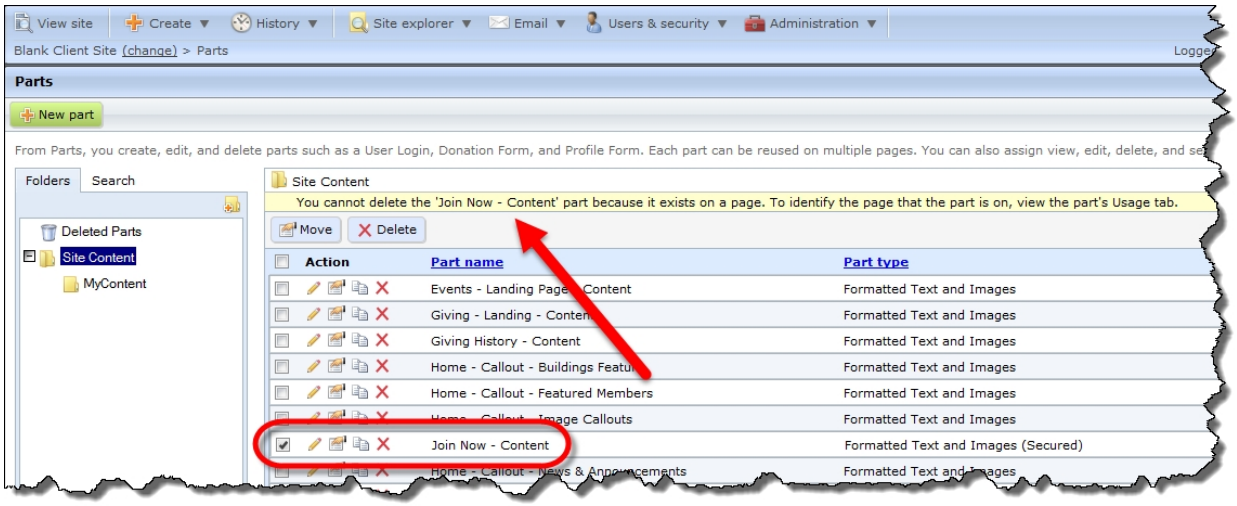
These features were introduced in Service Packs after the original Blackbaud Internet Solutions 4.0 release.

## Service Pack 1

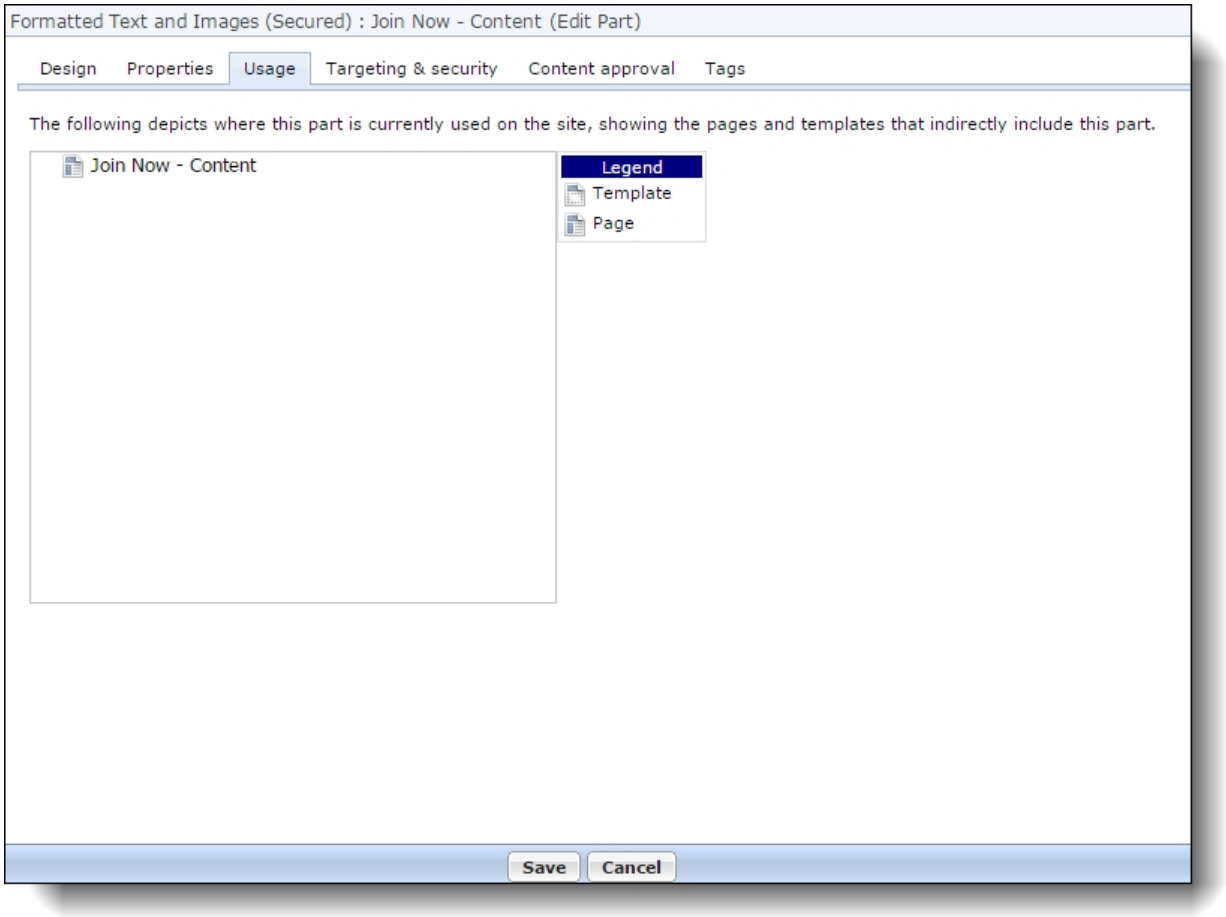
### Part Removal Safeguard

To prevent you from inadvertently removing active content from your website, you can no longer delete parts when they are associated with web pages. When you attempt to delete a part that is

associated with a single site, or shared across multiple sites, a message appears to inform you that you cannot remove it because it exists on a page.




To identify the pages where the part appears, select the part's Usage tab.



# Security Update

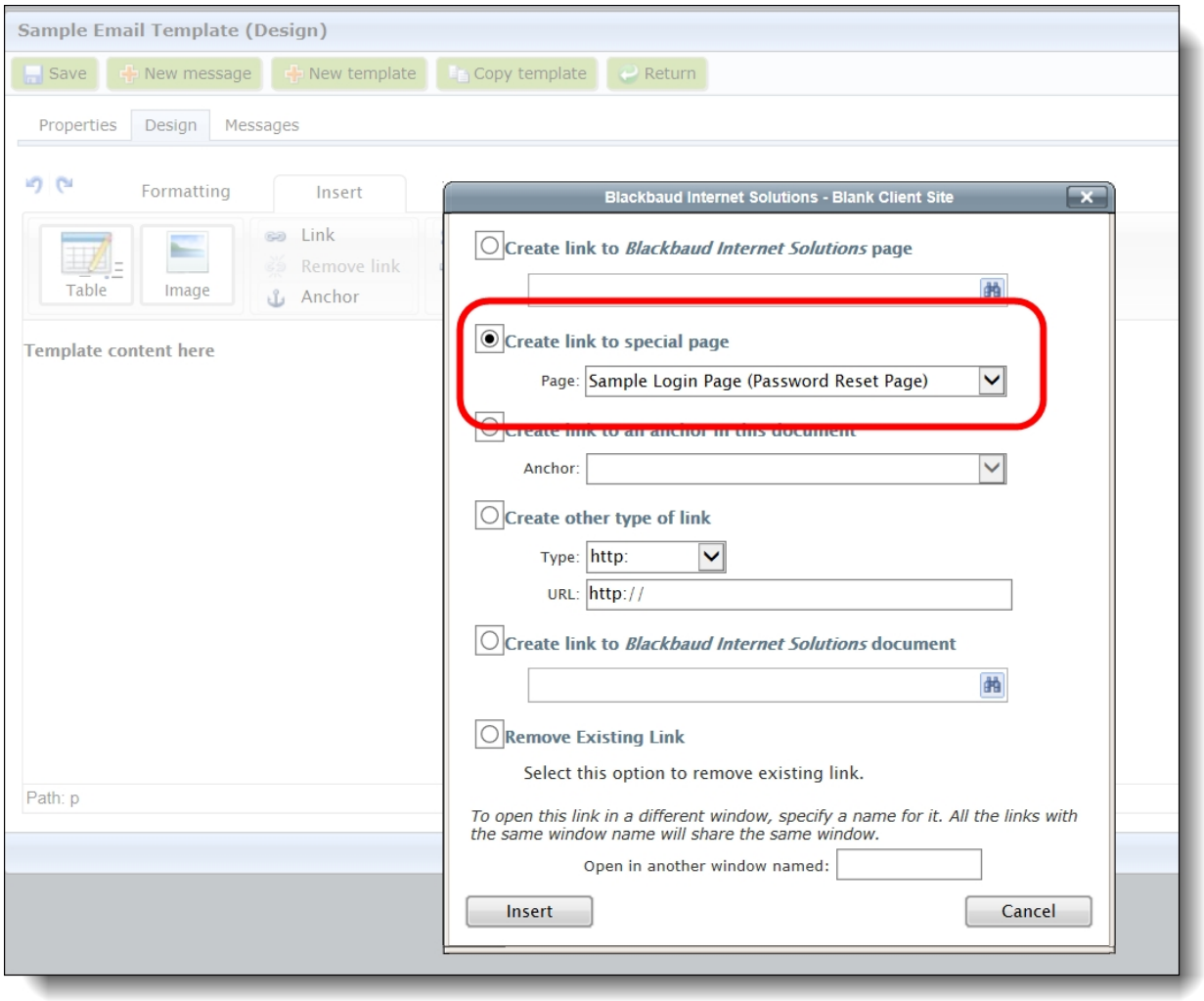
As part of our normal product improvement processes, we review our security measures, protocols, and infrastructure on an ongoing basis. Blackbaud Internet Solutions was automatically updated in this release to include security improvements which address vulnerabilities that could potentially compromise the integrity of our product. Please refer to this list to determine whether your organization needs to take any action.

- If your organization uses a customization to provide website registration or login functionality, the customization may not work correctly if it directly accesses the ClientsUsers table in the database. Instead, we recommend customizations use the methods contained in the Blackbaud.Web.Content.Core assembly and User class. If your organization uses standard Blackbaud Internet Solutions functionality for user login and password reset or if your customization calls passwords via the Blackbaud.Web.Content.Core assembly and User class, no action is required on your part.
- If your organization uses an iFrame from a third party website to direct users to Blackbaud Internet Solutions Donation, Event Registration, Membership, Sponsorship Form, or Sponsorship Search parts, you need to update the website to direct users to a form on a Blackbaud Internet Solutions page. We recommend you design the page to include the same look and feel as your third party site so that users seamlessly transition to the Blackbaud Internet Solutions page.

  ***Note:*** Blackbaud historically has not recommended the use of iFrames due to security issues. For more information, read the Knowledgebase article here.

# Password Reset Page Link

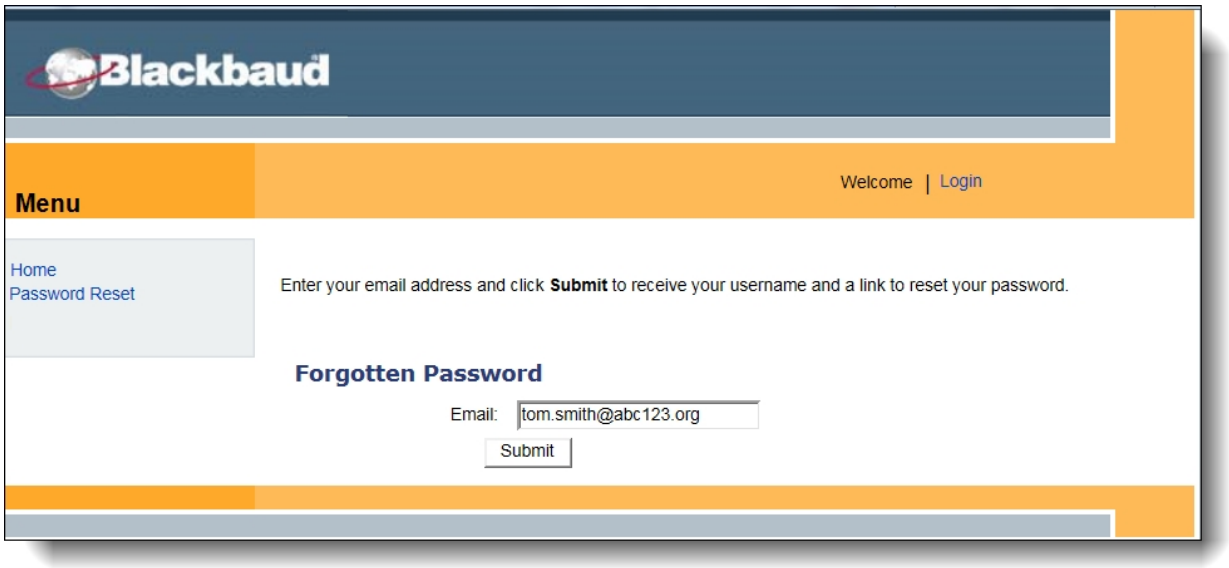
To improve password reset security in email messages from Blackbaud Internet Solutions, you now select a user login password reset page from the **Create link to a special page** option on the HTML Editor when you design the email message.



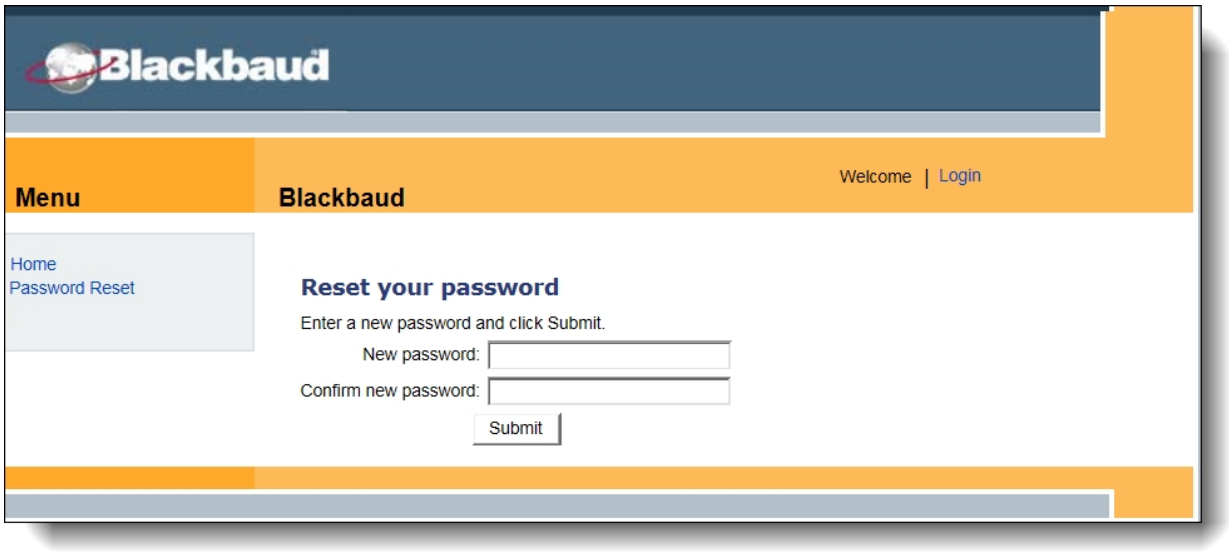

***Tip:*** The ability to create a special page to link to your user login page (that you define for **Page** settings in *Sites & settings*) previously existed. With this feature, any page that contains a User Login part now appears from the drop down and you want to select the user login page that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

This new link remains active in an email for the user to take action to reset the password any time.

When an email recipient clicks the link, a secure page appears with a **Forgotten Password** field for the user to enter their email address.




After the email address is submitted, another email sends to the user. That email contains another link that returns the user to the password reset page on your website.




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

# Social Media Login Welcome Email

Now when Blackbaud Internet Solutions website users register for the site with social media login credentials, the program sends them a confirmation email to welcome them to the site. Previously, the

program did not send these users an email. The program uses the same welcome email template you configure for other website registrants, but it merges "<social media username> via <social media account>" in the Username field.

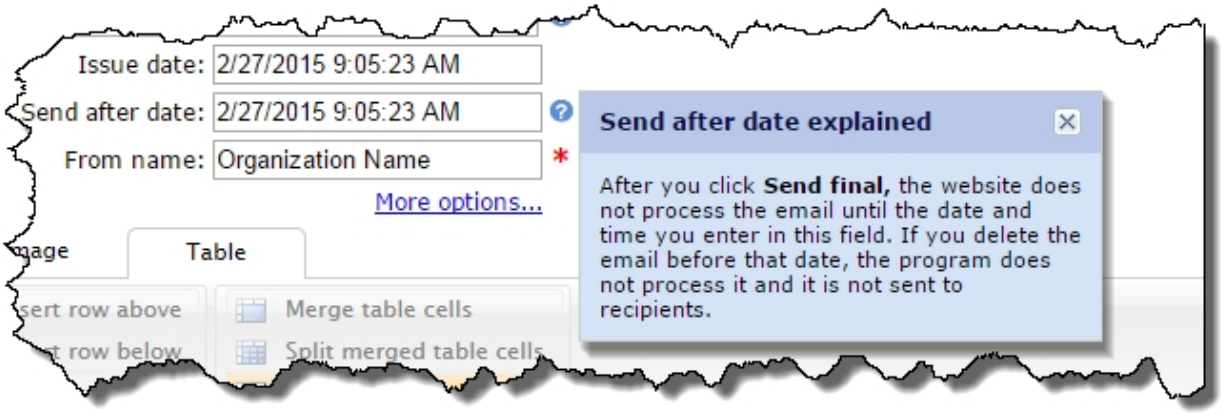
# Service Pack 2

## Security Update

As part of our normal product improvement processes, we review our security measures, protocols, and infrastructure on an ongoing basis. Blackbaud Internet Solutions was automatically updated in this release to include security improvements which address vulnerabilities that could potentially compromise the integrity of our product.

## Help Text in Email Messages

New help text is available for the **Send after date** field in *Messages* to explain that after you click **Send final**, the website does not process the email until the date and time you enter in the field. It also explains that if you delete the email before that date, the program does not process it and does not send it to recipients.

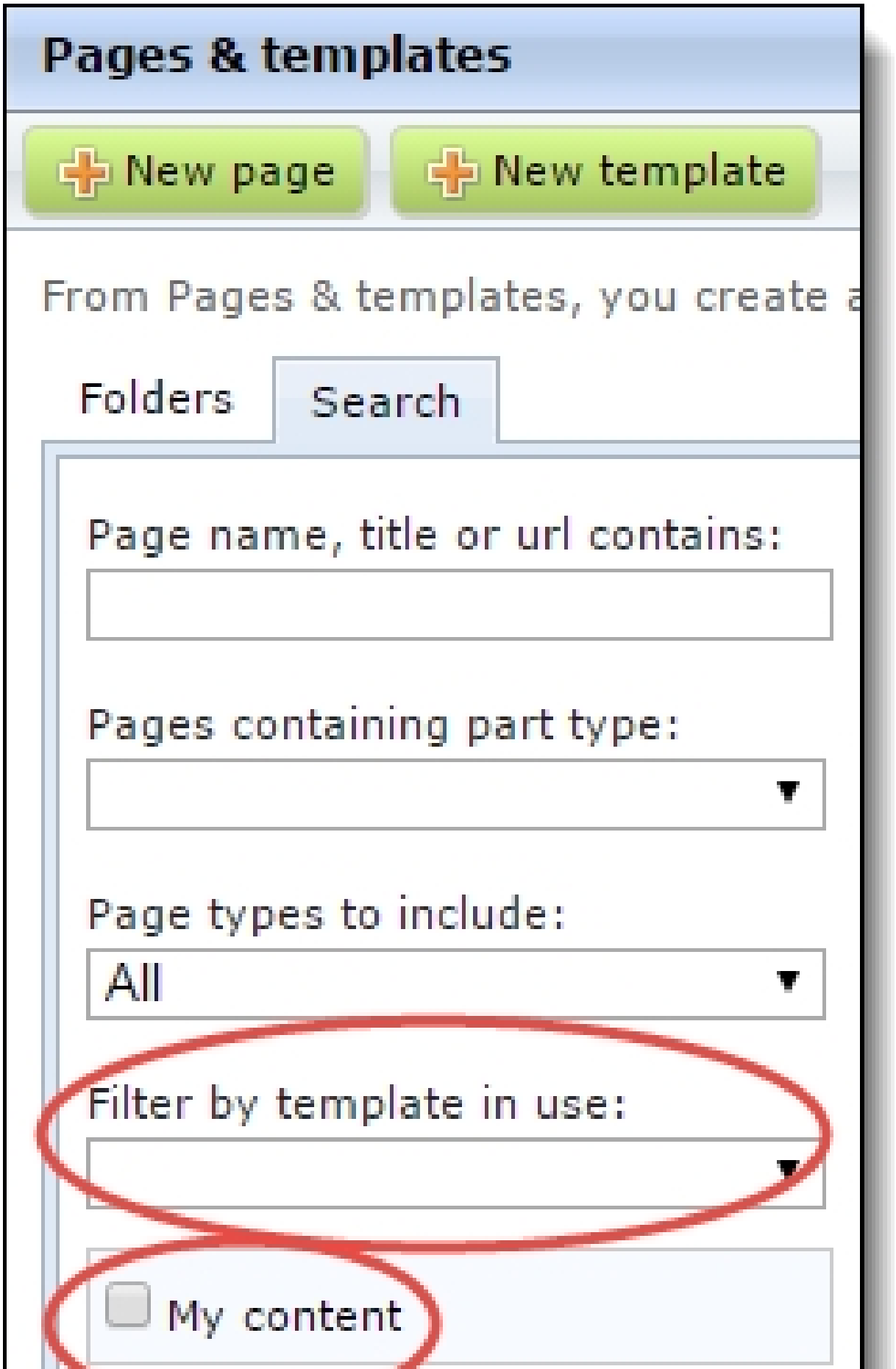



# Pages & Templates Enhancements

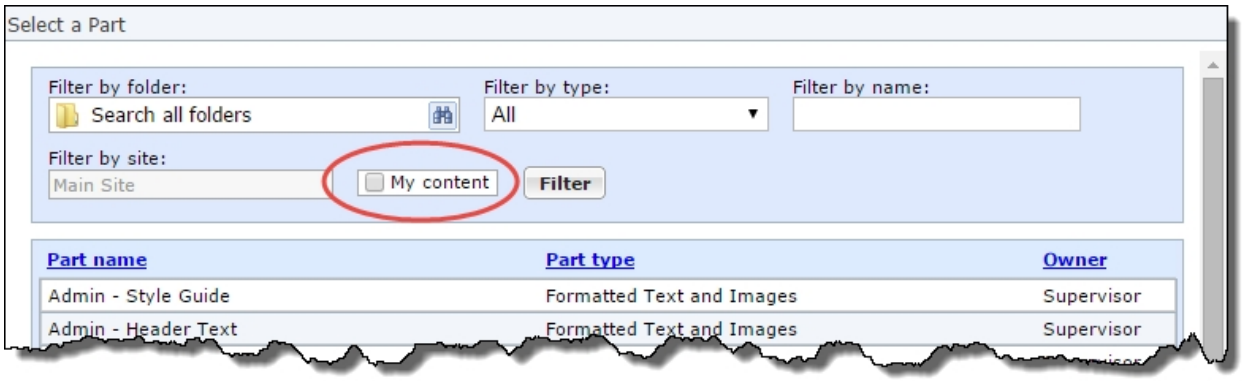
The following *Pages & templates* enhancement is available.

## Search Filters

To help you quickly find the pages you need, new search filters are available. From the Search tab, you can use the new **My content** or **Filter by template** options to narrow the results to pages you created or that use a specific template.

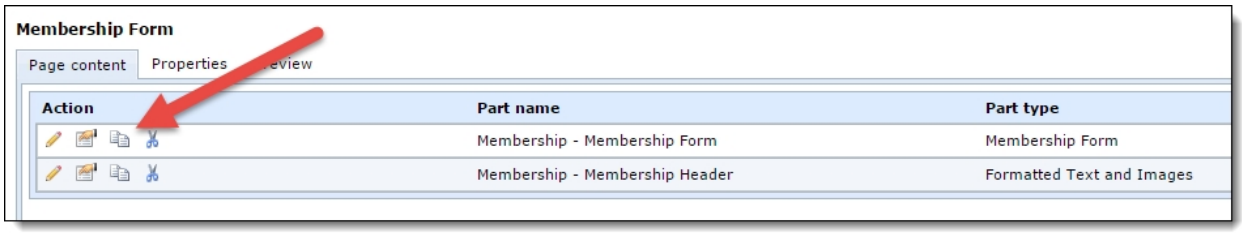

Pages & templates
New page
New template
From Pages & templates, you create a
Folders
Search
Page name, title or url contains:
Pages containing part type:
Page types to include:
All
Filter by template in use:
My content

Also, when you search for parts to insert on pages, the **My content** filter is available so you can limit the list to the parts you created.




# Additional Copy Part Option

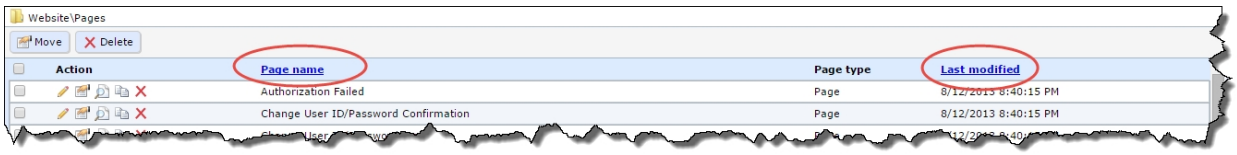
You can now copy parts from the Page content tab when you highlight a page in the list of pages. This change reduces the number of clicks required to copy parts when you navigate to them from the list of pages. Previously, you had to edit the pages to copy them or copy them from *Parts*.




# New Sort Options

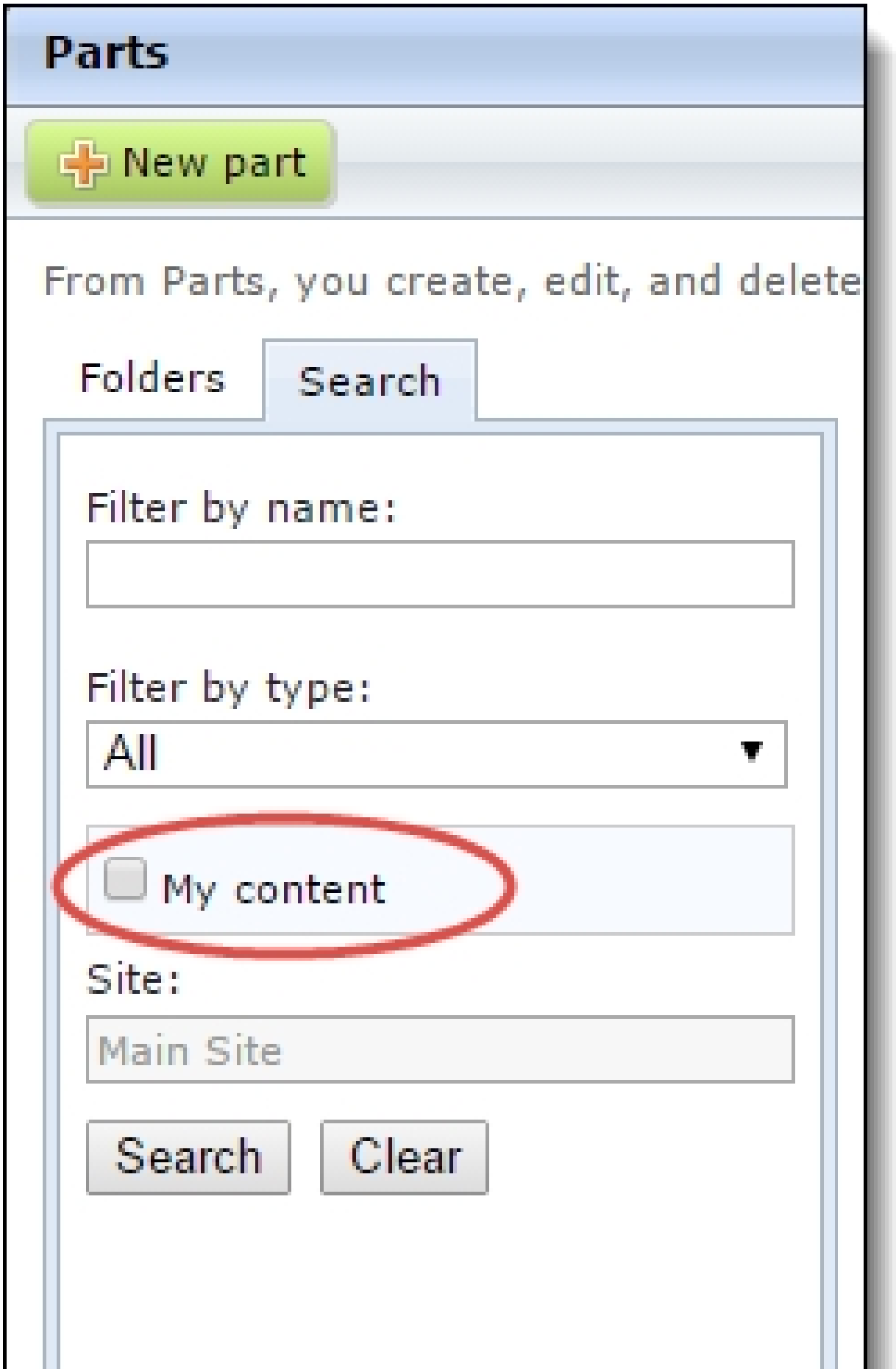
You can now use **Page name** or the new **Last modified** column to sort the list of pages. These changes help you to quickly find the pages you need.

***Note:*** When you sort the list, the pages appear in ascending order. Pages that begin with the letter A, or include the oldest changes, appear at the top of the list.



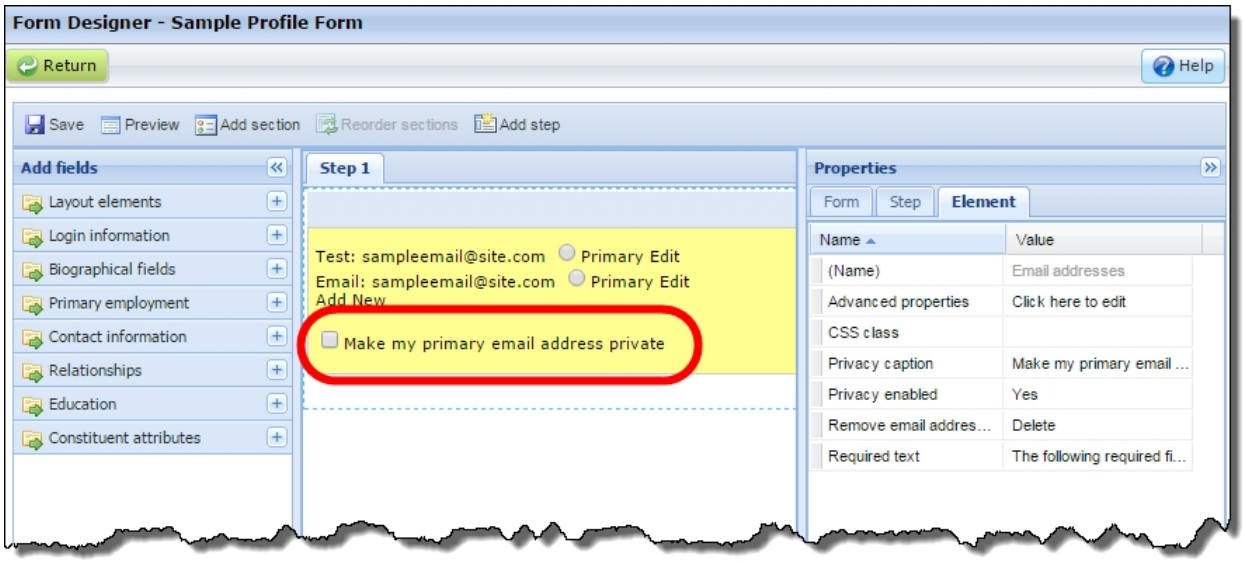

# Parts Search Filter

To help you quickly find the parts you need, a new search filter is available. From the Search tab, you can use the new **My content** option to narrow the results to parts that you created.


Parts
New part
From Parts, you create, edit, and delete
Folders
Search
Filter by name:
Filter by type:
All
My content
Site:
Main Site
Search
Clear

# Profile Update Form

When you design the Profile Update Form for your ***Blackbaud Internet Solutions*** website, the **Email addresses** element under **Contact information** has changed. To improve email address privacy for website users, the new **Make my primary email address private** checkbox appears in the design area when you add the element to a form.

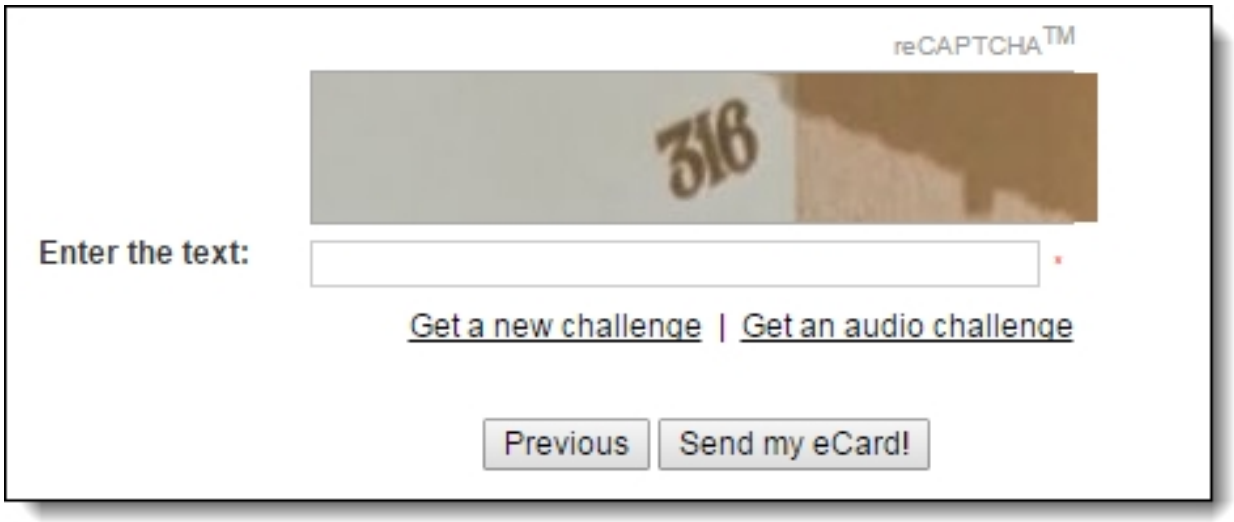



To display the checkbox on your web page so users can select whether to mark the primary email address as private, select "Yes" in the **Privacy enabled** row on the **Properties** pane. In the **Privacy caption** row, you can enter custom text for the checkbox to display on the page.

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

# reCAPTCHA Instructional Text

The default field label that appears for the image prompt on payment and new user registration forms that include reCAPTCHA images is changed. Previously, the label instructed users to "type the two words" shown in the reCAPTCHA image. Now, the text instructs them to "enter the text" since the images typically include characters that do not form words.



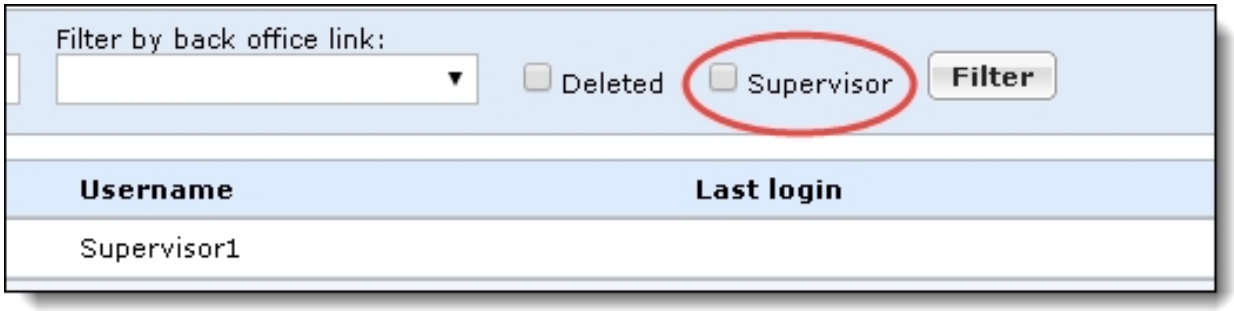

To change the new default message, navigate to the Language tab on the parts that include reCAPTCHA. Next, select the reCAPTCHA category and update the text in the **Image prompt** row.

The row is available for these parts:

- Donation Form
- Payment
- Payment 2.0
- User Login

# Site Administrators Filter for Users

Now when you use filters in *Users*, you can identify the people who are site administrators. Previously, you could only filter by the roles you added to your website. This change helps you quickly identify people with administrative access when you need to change rights, such as when a person is no longer employed by your organization.



# Service Pack 3

## Block Sending Email Messages and Scheduled Email

Your System Administrator can now use the BlockAllEmails and BlockScheduledEmails settings to prevent inadvertently sending email messages and scheduled email from a test environment. To do this, you must add <add key="BlockAllEmails" value="True" /> and <add key="BlockScheduledEmails" value="True" /> to the appSetting node in both web.config files for Blackbaud Internet Solutions and Blackbaud CRM. By default these settings do not appear in the file, and the default behavior is False.

***Tip:*** The BlockScheduledEmails setting *only* blocks emails sent from the *Email*, *Scheduled emails* functional area. It does not block scheduled emails set to send when you use the **Send after date** field in *Messages* or *Marketing Efforts*.

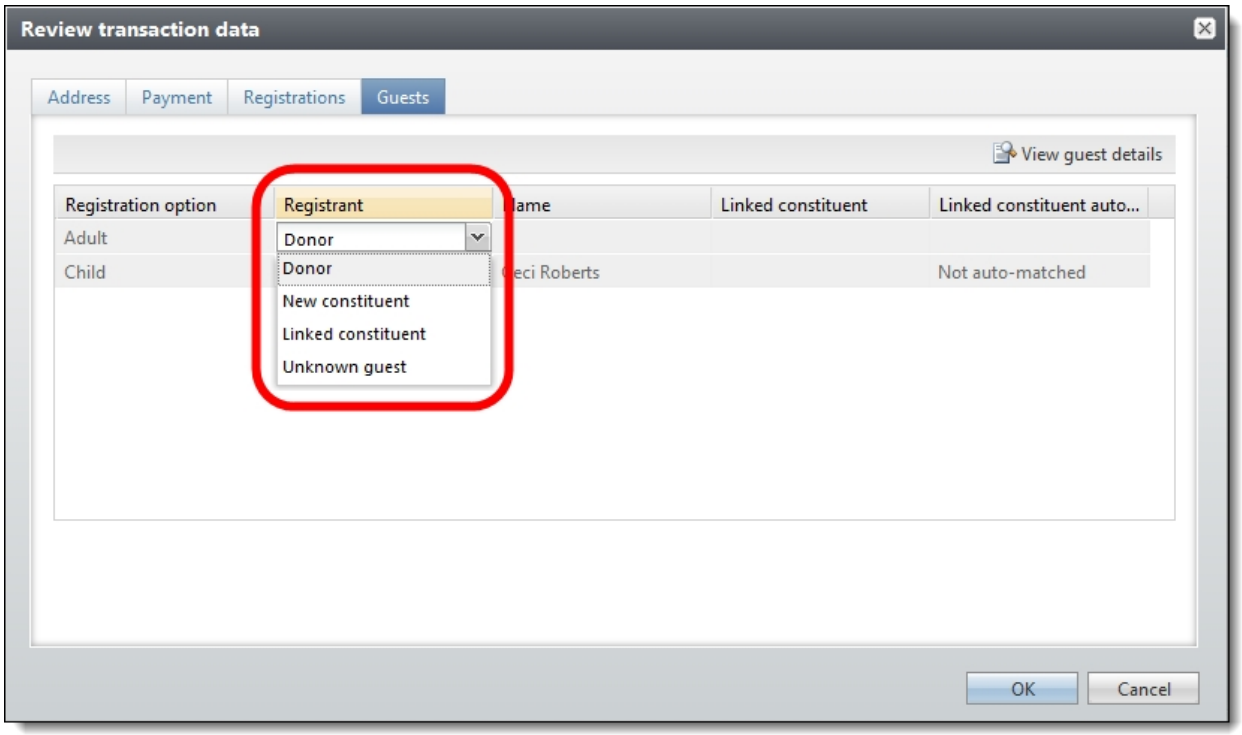
If Blackbaud Hosts your website and you want to request an update to your web.config file, contact Customer Support from Blackbaud's website.

***Note:*** With this change, the ProcessCMSEmail.BusinessProcess.vb file has been updated for the Process CMS Email Business Process in Blackbaud CRM.

# Service Pack 4

## BBIS Event Registration Transaction Batch: Donor Option

When a website user submits an event registration on your Blackbaud Internet Solutions website and you process it in the BBIS Event Registration Transaction Batch in Blackbaud CRM, you can now select "Donor" in the **Registrant** column on the Guests tab when you view transaction details. Select this option when the donor submits their information as a guest instead of the primary registrant




You can also change the registrant from Donor to Linked constituent, New constituent, or Unknown guest.

***Tip:*** Previously, you could select "Donor" in the ClickOnce version of Blackbaud CRM.

# Middle Name Field

The Donation Form, Payment, and Payment 2.0 parts now include the **Middle name** field under **Additional fields**.

***Note:*** This change satisfies the Canadian Revenue Agency's requirements for donation receipts.

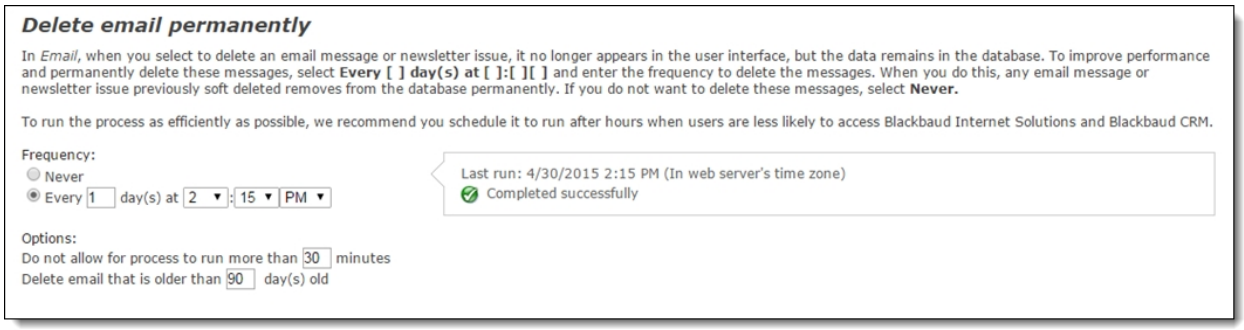
# Service Pack 5

## Delete Email Messages and Newsletter Issues Permanently

***Note:*** With the 4.0 Service Pack 8 release, a new **Automatically delete email older than** option appears on this setting for you to delete messages and newsletters based on whether the email is beyond a certain number of days, months, or years. For more information about this feature, refer to **Delete Email Messages and Newsletter Issues Permanently Update on page 47**.

To improve performance and delete email messages and newsletter issues in bulk, you can now run a process to permanently delete these from your database. In *Email*, when you delete an email message or newsletter issue, it only soft deletes. When you soft delete email, it removes from the user interface, but the data remains in the database. To delete this email permanently from the database, schedule the new **Delete email permanently** organization setting in *Administration*.

To schedule the frequency and other options for the process, navigate to the setting under **Schedules**.




Under **Frequency**, you schedule a day and time frequency to run the process to permanently delete email messages and newsletter issues in the **Every [ ] day(s) at [ ]:[ ][ ]** fields.

***Tip:*** To prevent the program from running this process, select **Never**. By default, this is selected when you upgrade to this version.

Under **Options**, you enter the number of minutes to allow the process to run and you also enter the number of days to retain soft deleted email messages and newsletter issues in your database so that the remainder of your soft deleted email deletes permanently during the process.

### Important Tips

- To prevent the possibility of anyone scheduling the **Delete email permanently** 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.
- 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.

> ***Note:*** If you schedule this process and the **Email jobs** process to run at the same time, please be aware your email job process may experience a delay.

- 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.

- To determine the email that remains soft deleted and the email that deletes permanently, the program compares the sent date of the email to the number you enter in the **Delete email that is older than [ ] day(s)** field. It is important to consider this as you determine the number of days to enter in this field.

  For example, today's date is March 15 and you enter "90" in this field. Email that was sent on January 15 remains soft deleted in your database. However, email that was sent on November 15 deletes permanently.

## 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.

- **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.

- **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 records and processes in Blackbaud CRM, refer to the Blackbaud CRM help file.

# Advanced Donation Form - Pledge Installments API

When you use the Advanced Donation Form to create a custom donation web page, ***Blackbaud Internet Solutions*** now includes API end points for pledge installments. Pledge installments are the payments a donor makes for a pledge according to a defined time schedule. These end points allow you to capture pledge and installment information, and they also allow you to tokenize a credit card for future pledge installment payments.

***Note:*** The pledge installments API offers additional flexibility, but comes with additional complexity. If you host your own website, we strongly recommend only developers knowledgeable in all areas of customizations design this feature. This includes using endpoints, objects, and the API, as well as writing HTML and JavaScript code. Users without this expertise should not design this page. For information about the API, refer to the Developer Guide. If Blackbaud hosts your website, customizations can only be completed by Blackbaud or one of our designated partners. For more information, please contact your Blackbaud Account Executive.

The following end points are now available.

- payment.Gift.PledgeInstallment.NumberOfInstallments (integer)
- payment.Gift.PledgeInstallment.InstallAmount (number)

Recurrence for these new end points uses these existing end points.

- payment.Gift.Recurrence.Frequency
- payment.Gift.Recurrence. DayOfMonth
- payment.Gift.Recurrence. Month
- payment.Gift.Recurrence. StartDate

Also, two new javascript functions are now available.

- getRecurringGiftInstallmentAmount(totalGiftAmount, numberOfInstallments)

  This calculates the price of each installment for a recurring gift based on the number of installments the website user wants make.

- getRecurringGiftLastPaymentDate(numberOfInstallments, frequencyCode, installmentStartDate, installmentMonth, installmentDayOfMonth)

  This calculates the end date of a recurring installment based on the number of installments the website user wants make.

# Service Pack 6

# Blackbaud Secure Payment Page Upgrade

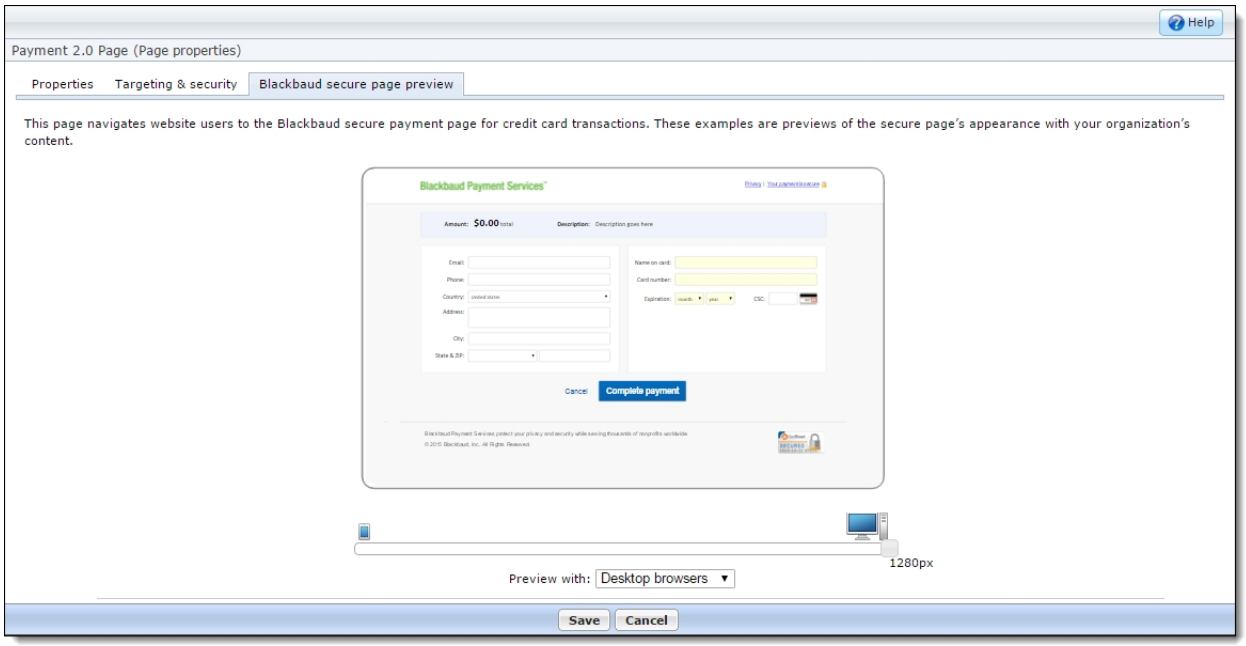
To provide an optimal check out experience for website users on multiple devices, you can now upgrade your static Blackbaud secure payment web pages to responsive web pages that use HTML5 or CSS3. You can select to upgrade each secure payment page individually, or you can upgrade all pages, across all of your websites, at the same time.

***Note:*** The Blackbaud secure payment page processes credit cards only; it does not process direct debits. This functionality has not changed between the static and responsive web page upgrade.

After you upgrade Blackbaud secure payment pages from static to responsive, you cannot use static pages again.

### Upgrade an Individual Secure Payment Page

In *Pages & templates*, the new Blackbaud secure payment preview tab appears from page properties when the page contains a part that integrates with the Blackbaud secure payment page. For example, if the page contains a Payment 2.0 part that uses the Blackbaud secure payment page, the tab appears.



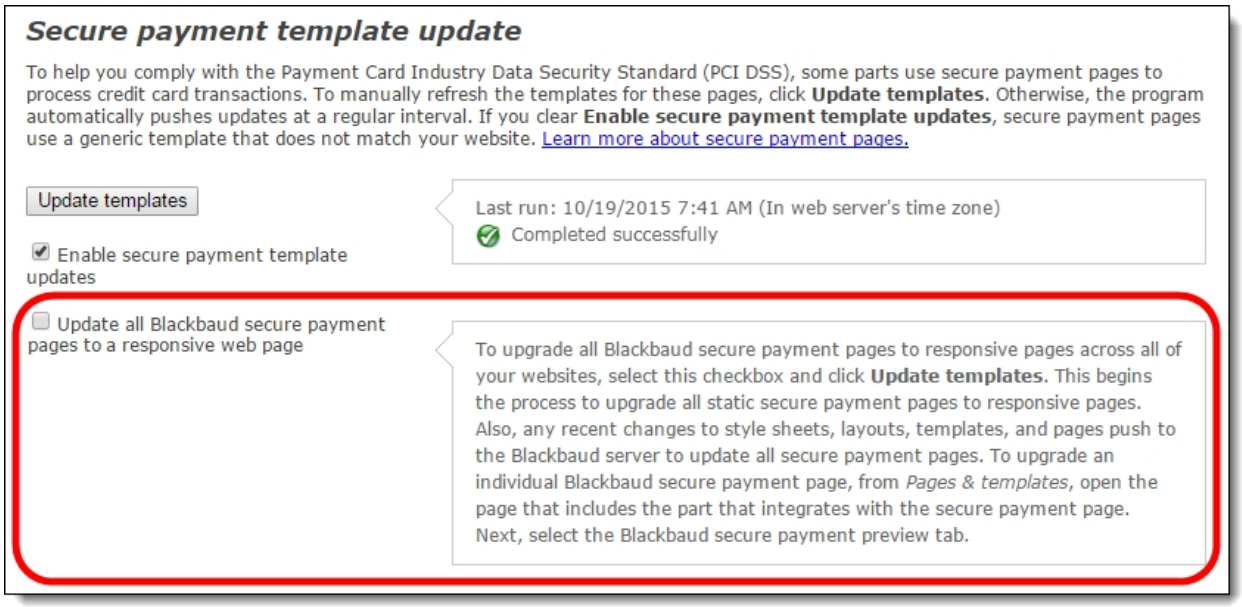

The template examples that display on the tab are previews of the secure payment page's appearance with your organization's content. Template 1.0 displays a preview of the existing static page. Template 2.0 displays a preview of the responsive page after you upgrade.

***Tip:*** Use the horizontal bar to scroll and mimic page responsiveness for Template 2.0. To toggle the template examples between the desktop and mobile style sheet associated with the page, select the browser option in the **Preview with** field.

To upgrade the Blackbaud secure payment page to a responsive page, select **Use responsive web page for Blackbaud secure payments**. When you save the page, it upgrades immediately. Also, any recent changes to your style sheets, layouts, templates, and page also push to the Blackbaud server to update the page.

## Upgrade All Secure Payment Pages, Across All Websites

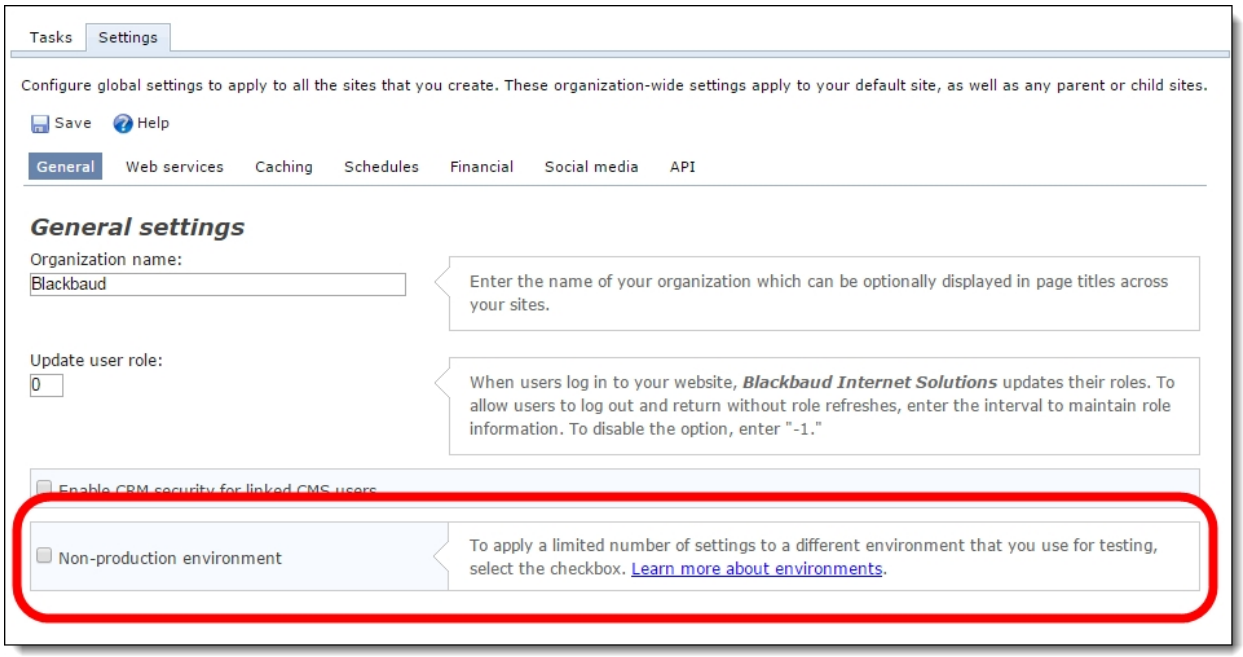
In *Administration*, *Sites & settings*, the new **Update all Blackbaud secure payment pages to a responsive web page** checkbox appears under the **Secure payment template update** setting.




When you select this and click **Update templates**, the process begins 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.

# Organization Setting: Non-Production Environment Checkbox

From *Administration*, *Sites & settings*, you can now 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:*** When you upgrade to this version, the checkbox is *not* selected and your website remains in your Production environment. If you do select the checkbox, the setting applies to each website you host, whether it is one site or multiple sites.

Currently, there are two features you can alternate between Production and Non-production environments. The following table lists the feature and what you can do in each environment.

| Feature | Non-production | Production |
|---|---|---|
| **Secure payment template update** organization setting | 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. | 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 | Disable email jobs sent from the *Email, Scheduled emails* functional area.<br><br>**Tip**: The Non-production environment does not prevent an email job from sending to recipients when you use the **Send after date** field in *Messages* or *Marketing Efforts*. | Blackbaud Internet Solutions sends messages for email jobs from the *Email, Scheduled emails* to recipients as expected. |

# Service Pack 7

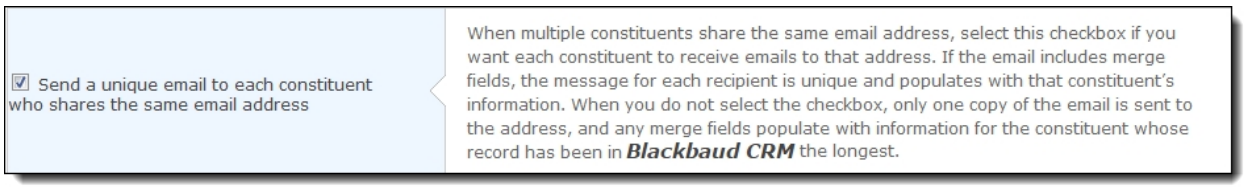
There are no new features in Service Pack 7.

# Service Pack 8

## Email Settings

You can now easily indicate whether to send multiple or single copies of emails when two or more constituent records include the same email address. This setting eliminates the need for you to remove duplicates before you send emails.

To send one email to multiple constituents with the same email address, clear the new **Send a unique email to each constituent who shares the same email address** option in *Sites & settings*. You typically select this when you want constituents, such as spouses, who share email addresses to each receive a copy of messages.




***Note:*** This checkbox is selected by default. You do not need to clear it if you want the program to continue to send emails to each constituent.

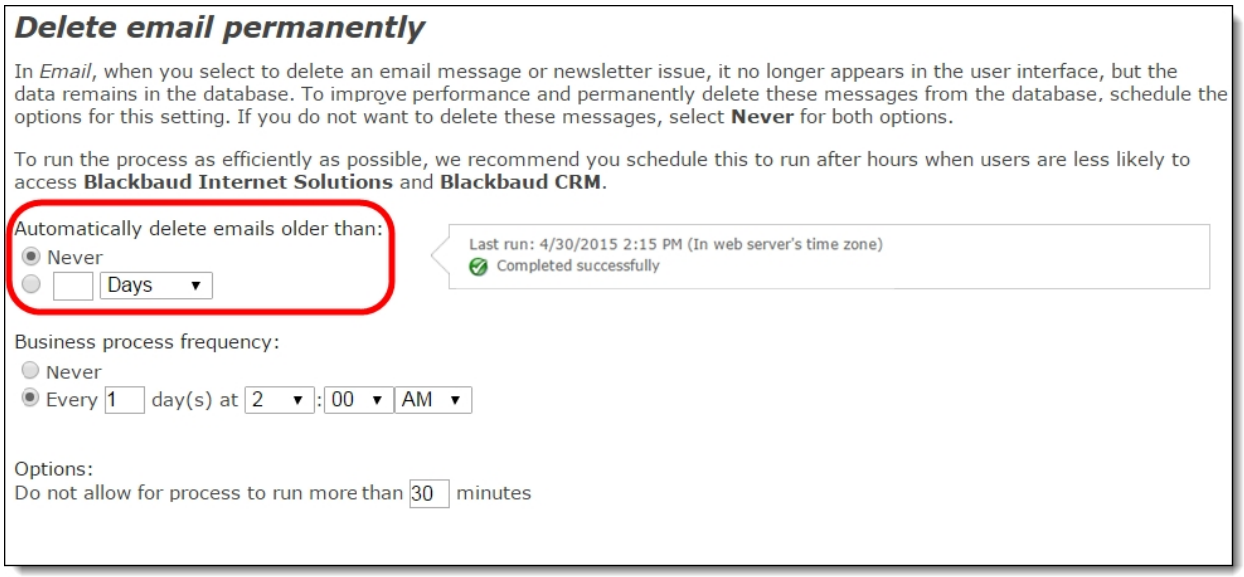
This setting applies to constituents in an email list with a data source of Constituent or Imported. When you clear the checkbox, merge fields populate with information for the constituent whose record has been in the database the longest. When you select the checkbox to send a unique email to each constituent,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

# Delete Email Messages and Newsletter Issues Permanently Update

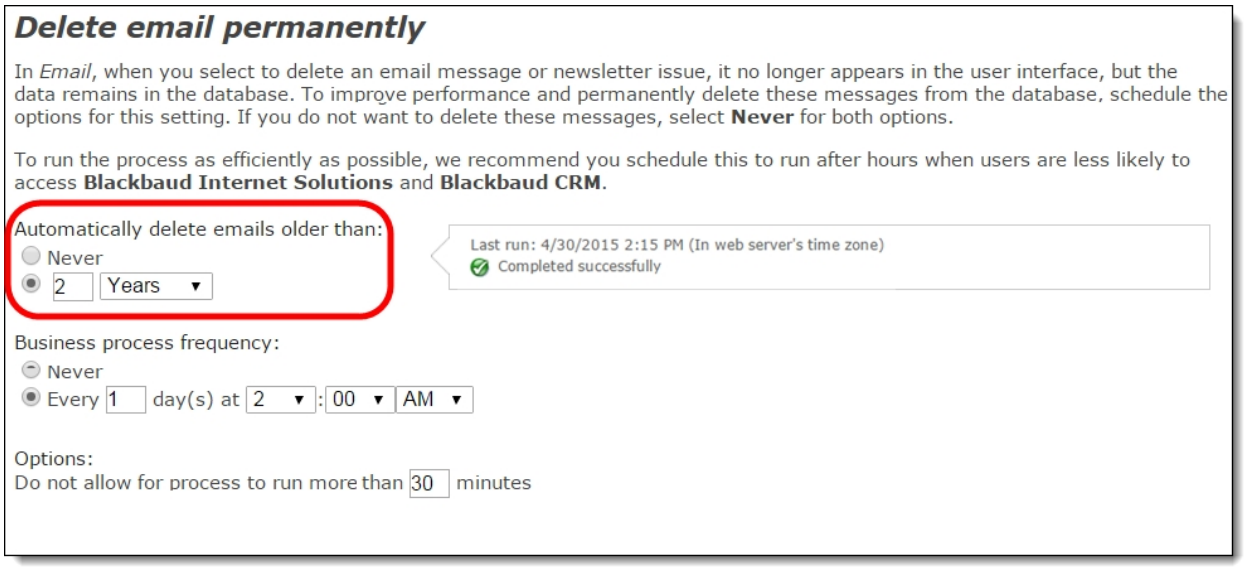
As a follow up to the new **Delete email permanently** organization setting in *Administration* (released in version 4.0 Service Pack 5), you can now select to delete messages and newsletter issues based on whether the email is beyond a certain number of days, months, or years. This enhancement automatically deletes email from the *Email* area of Blackbaud Internet Solutions and the back end of the database.

***Tip:*** For more information about the original implementation of this setting, refer to **Delete Email Messages and Newsletter Issues Permanently on page 41**.

To delete email permanently based on age, schedule the new **Automatically delete email older than** option.




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.




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.

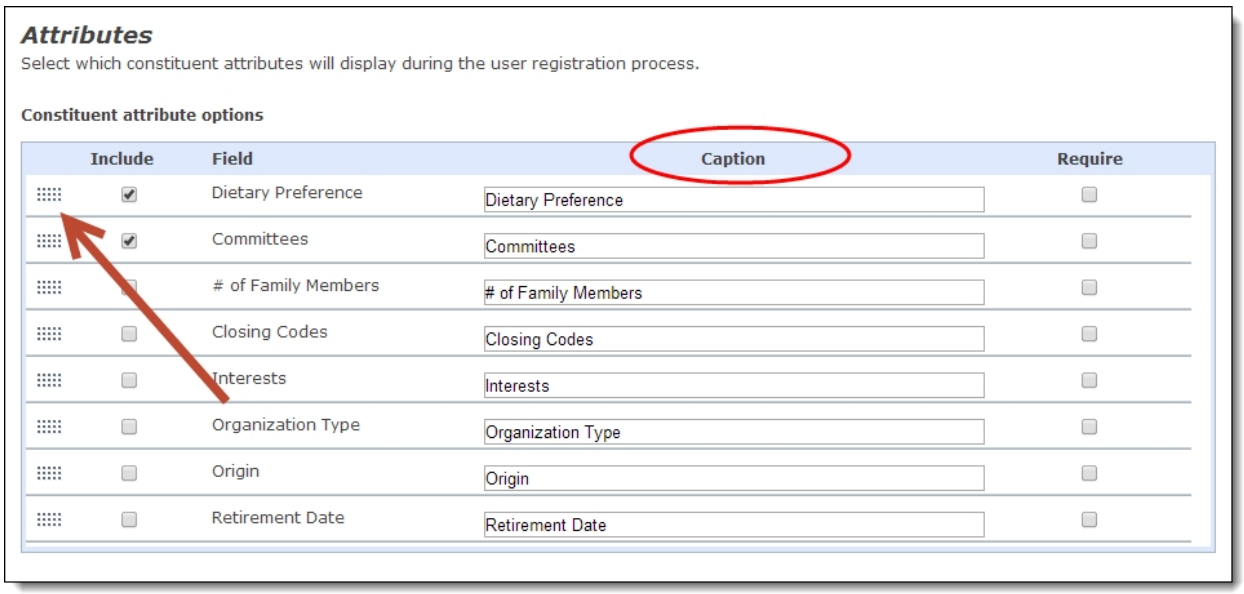
***Note:*** To prevent the program from processing the **Delete email permanently** setting, it is important to remember that you select **Never** under **Business process frequency**. This is part of the original feature that released with Service Pack 5. Also, as a result of this new **Automatically delete email older than** feature, the **Delete email that is older than [ ] day(s)** field has been removed from this setting.

# Service Pack 9

## User Login: Constituent Attributes

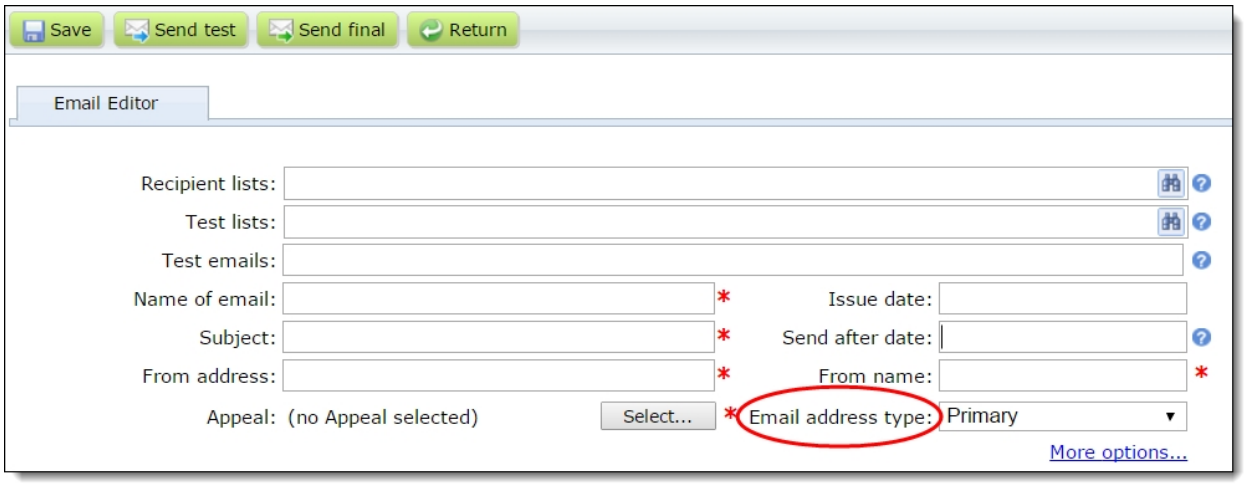
The User Login part now includes the ability to change the order of the constituent attributes appearance on the form and modify their labels. Under **Attributes**, click and drag the dotted button on the far left to move an attribute in the updated grid. To change the label text, enter it in the **Caption** field.

These updates provide flexibility so you can specify how the attributes should appear on the form, such as if you want them in the same order as they are arranged in Blackbaud CRM.



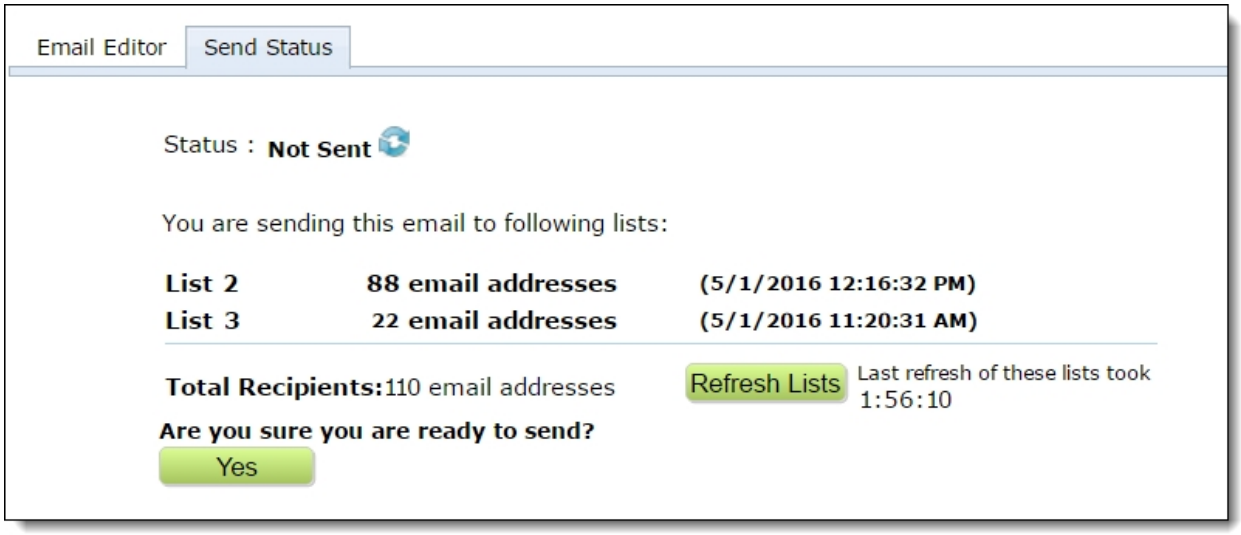

# Email Address Type Field

To enable you to specify which email address to use for messages you send to constituents, a new **Email address type** field is now available when you create templates from **Email, Templates** or messages from **Email, Messages**. When a constituent does not have the email address type you select in the field, the message is sent to their primary email address. For more information, see Design and send an email message.




# Sending a Final Email

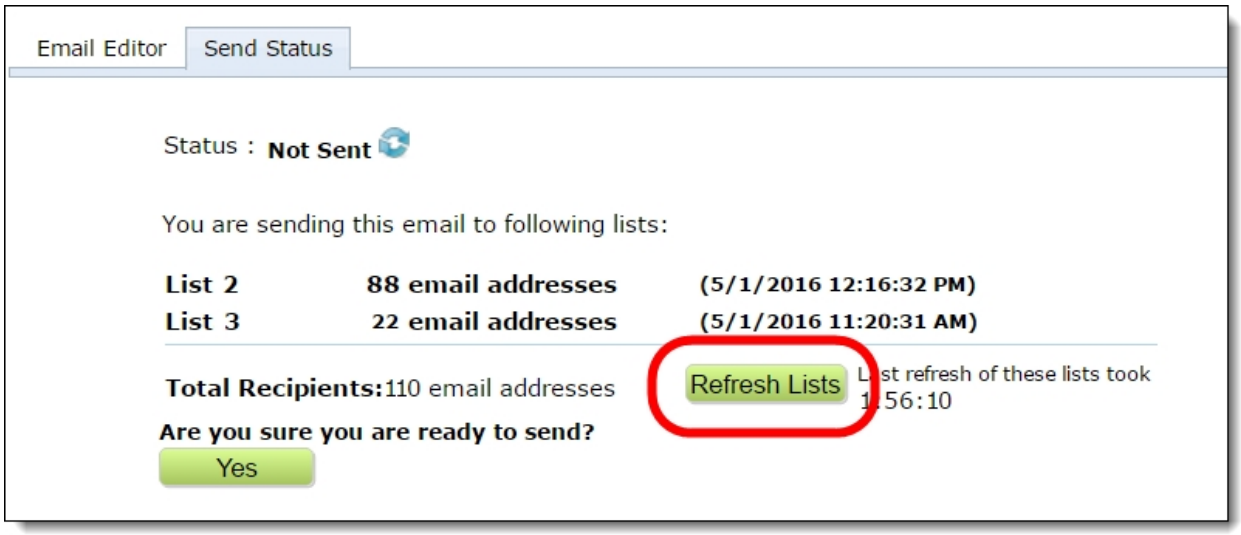
To increase email efficiency, we have enhanced the send final email process to help make sure the correct group of recipients receive your intended email. Now, when you click **Send final** on an email message, a new Send Status tab appears for you to view the target lists, the number of recipients in each list, and when the lists were last refreshed.



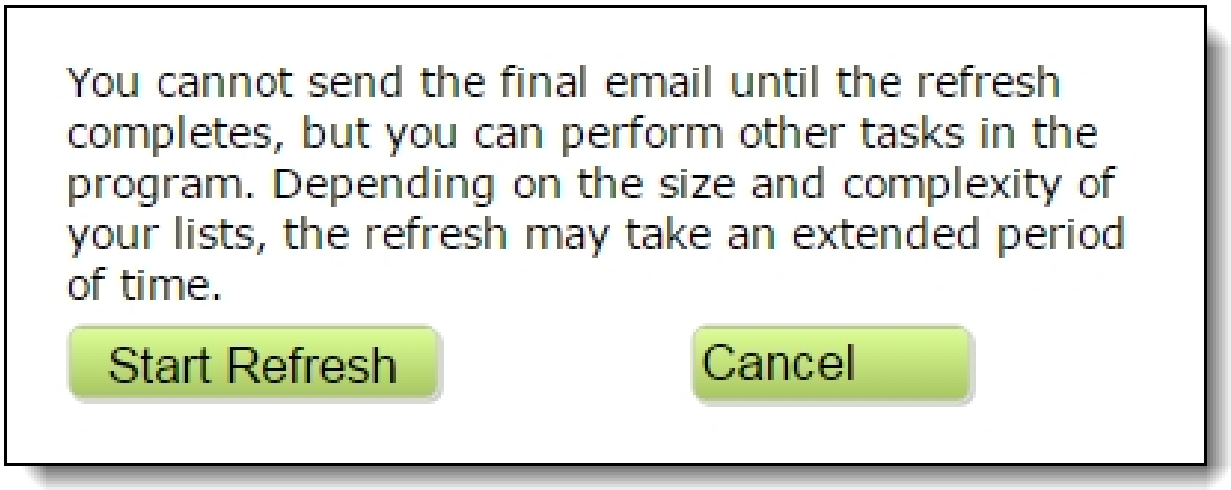

***Note:*** This new feature only applies to email sent from *Messages*.

To make sure the latest recipients are in the queries that the lists use, click **Refresh Lists**.

***Note:*** You are not required to refresh the lists before sending the message. When you click **Yes** to send the final message, lists that use dynamic queries automatically refresh. This does not apply to lists that use static queries.

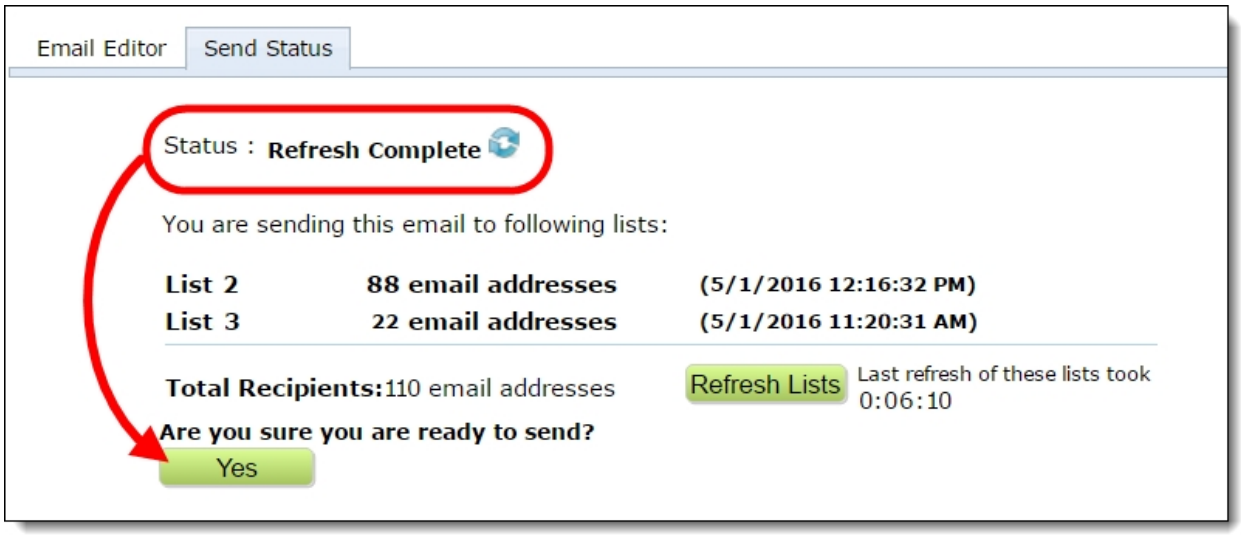



A message appears for your review before clicking **Start Refresh** to begin the process.




***Tip:*** It is important to read this message. It informs you that you can do other tasks in the program while the refresh processes, but you cannot send the final email. It also states the refresh may take an extended period of time depending on the size and complexity of your lists.

After the refresh completes, click **Yes** to actually send the final email to recipients.

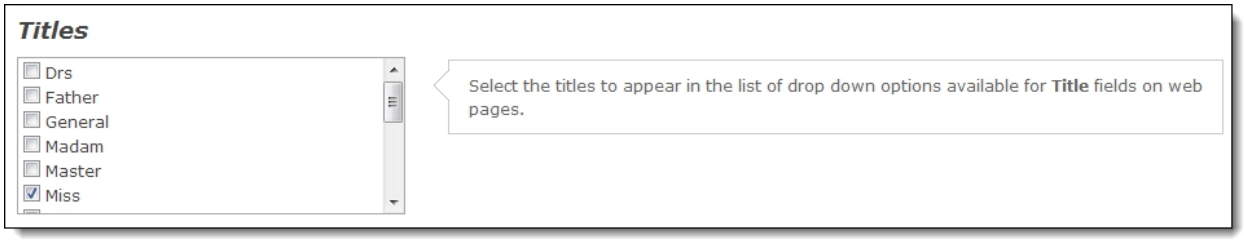



When you do this, one more refresh occurs automatically for lists that use dynamic queries. This may cause the recipient numbers on the Sent Status tab to differ from the final sent numbers that appear in email reports. If your lists use static queries, this does not apply. For more information about email statuses, refer to the *Email Guide*.

***Note:*** When you enter a date in the **Send after date** field, the email does not send until the date and time you specify in that field.

# Title Settings

In organization settings, the new **Titles** section allows you to filter the titles that appear in the drop down list for **Title** fields on web pages. Previously, all the titles from Blackbaud CRM appeared in the list. Use this feature to remove titles that are not frequently selected by website users, such as General and Chief.



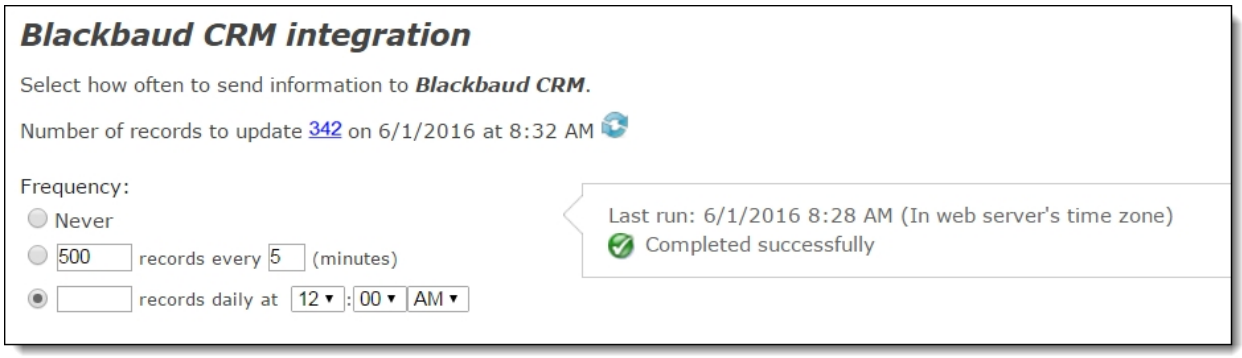

When you upgrade to this version and view the new setting, all active titles from Blackbaud CRM appear with each checkbox selected. To make a title unavailable for your site, clear its checkbox and click **Save** on the General tab.

Titles you do not select are only available on your website when users are logged in and their profiles include existing titles that do not appear in the drop down list. In those instances, the program adds the titles to their form drop down lists.

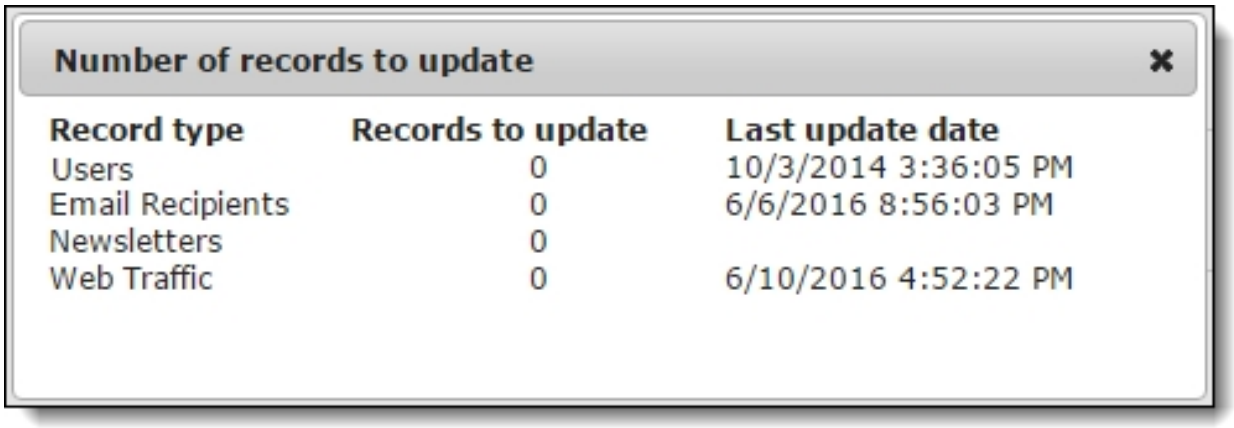
***Note:*** If your website includes custom JavaScript to restrict **Title** field drop downs, we recommend you test these fields on your site after you install this version. It is possible you no longer need this customization.

# Integration Services Setting: Number of Records to Update

When you view the **Blackbaud CRM integration** service setting on the Schedules tab in *Administration*, it now displays the number of records to update in Blackbaud CRM. This is an informative way for you to monitor the amount of data the setting needs to process, which helps you avoid integration delays from Blackbaud Internet Solutions to Blackbaud CRM.




When you select the hyperlink for the number of records to update, a screen appears that lists each record type to update. The number of records to update for each type also appears, along with the type's last integration date.



Number of records to update

| Record type | Records to update | Last update date |
|---|---|---|
| Users | 0 | 10/3/2014 3:36:05 PM |
| Email Recipients | 0 | 6/6/2016 8:56:03 PM |
| Newsletters | 0 | |
| Web Traffic | 0 | 6/10/2016 4:52:22 PM |

To view the latest data currently waiting for process from Blackbaud Internet Solutions to Blackbaud CRM, select the **Refresh** icon. When the refresh completes, the date and time update to reflect when you last refreshed the number.

Under **Frequency**, you also now specify the number of records to send to Blackbaud CRM during each schedule in the updated interval and daily options.

***Tip:*** This feature allows you to configure the number of records to update, which was previously not user-configurable.

## Email Security Enhancement

Due to updated security enhancements, there is now more stringent security to enforce strong email passwords.

Strong passwords must meet the following criteria:

- Are case-sensitive
- Must be a minimum of 8 of characters long
- Cannot contain any part of your full name
- Cannot contain any part of your account name
- Cannot be one of your last 24 used passwords
- Must contain a combination of uppercase letters, lowercase letters and numbers:
    - Uppercase letters (A - Z)
    - Lowercase letters (a - z)
    - Numbers (0 - 9)
- May contain one of the following special characters: ! $ . # %

After updating to Service Pack 9, you may be required to change your password before you can send email. To determine whether you need to change your password, go to **CRM > Administration > Configuration > Email Services** and confirm if you can successfully connect. If you receive an error, contact Support to help you update your password.

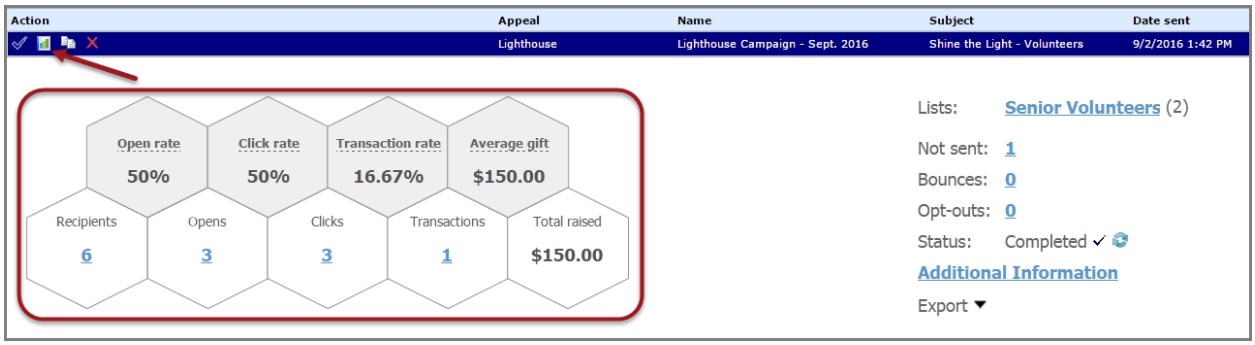
# Service Pack 10

## Email Performance Statistics Enhancements

To modernize email and improve statistical information to current industry standards, performance statistics for email messages have been enhanced. To centralize the data, you now view most statistics for an email message in one grid instead of clicking multiple tabs and sub-tabs. After you send a message, its row on the Messages page updates to display the grid. The percentages and counts that display update automatically each time you access the grid so you always view the latest statistics.

***Note:*** The email performance statistic enhancements are only available in *Email* > *Messages*, not in *Email* > *Campaigns* or *Email* > *Newsletters*.

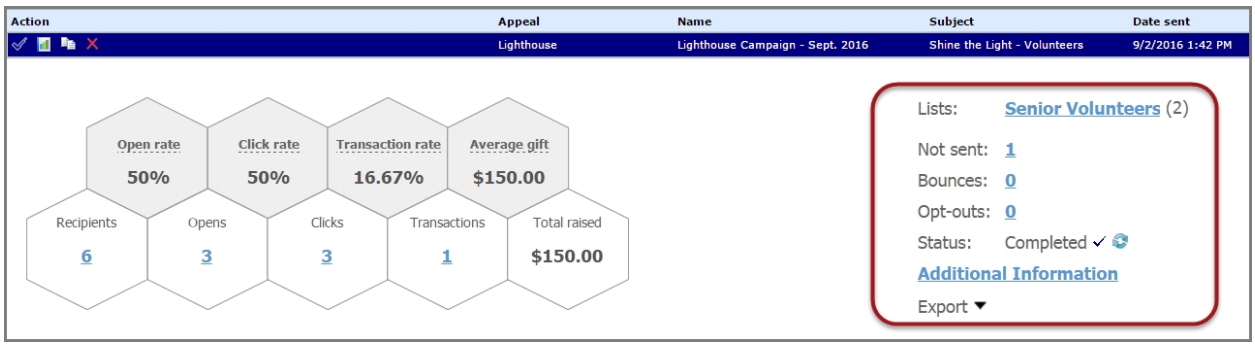
From *Email*, *Messages*, select a message and click **Click here to view report** ( ) in the **Action** column. The performance statistics grid displays below the message row.




The top row of the grid displays the email activity percentages for **Open rate**, **Click rate**, and **Transaction rate**, as well as the **Average gift** amount raised as a result of the message. You can hover over each statistic title to view a description of how the value was calculated.

The bottom row of the grid lists email activity in total amounts for **Recipients**, **Opens**, **Clicks**, and **Transactions**. You can click each amount to view a list of email addresses associated with the statistic. The **Total raised** amount is also shown.

Next to the statistics grid, additional information displays.




Here you can view the distribution lists used for the message, the number of messages that were not sent or that resulted in bounces and opt-outs, and the email job status. When you click the **Not Sent**, **Bounces** and **Opt-outs** values, you can view more information about these statistics, such as the associated email addresses.

Click **Additional Information** to display more details about URL performance, total number of views and unique viewers, total number of transactions, and the message content and properties. You can also export the email statistics to a *.csv file. Click **Export**, then select either Summary or Details.

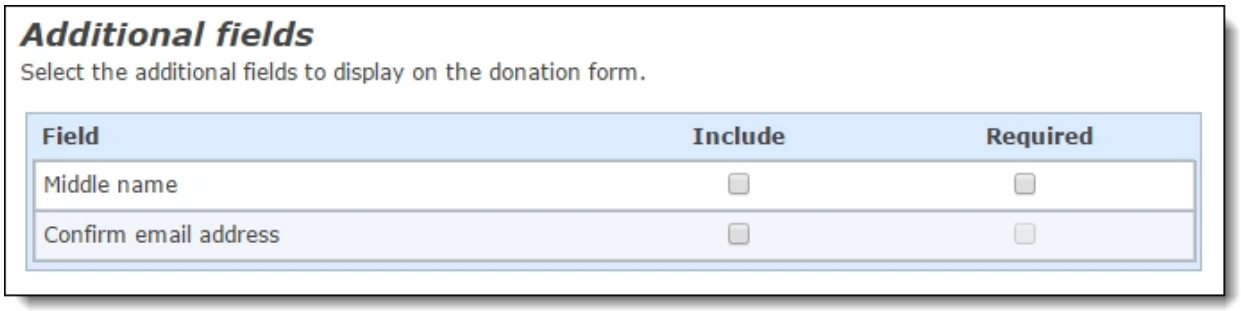
The **Email Status Log** icon displays in the **Action** column and to the right of the statistics grid next to **Status**. Depending on the status of the email job, the icon displays as one of the following:

- ✓ - Completed
- ⓘ - In progress
- ⚠ - Failed

You can click the icon to display more information about the email status.

# Confirm Email Address Field

To improve email address accuracy, multiple parts now include the option to include a new **Confirm email address** field. When you select to display it on a web page, website users must enter their email address two times. Blackbaud Internet Solutions then compares the two email addresses to make sure they match.




The following parts now include this field.

- Donation Form
- Event Registration Form
- Membership Form
- Sponsorship Form
- User Login Form
- Payment 2.0 Form

# Security Update

As part of our normal product improvement processes, we review our security measures, protocols, and infrastructure on an ongoing basis. Blackbaud Internet Solutions was automatically updated in this release to include security improvements for credit card processing in compliance with Payment Application Data Security Standard (PA-DSS). Please refer to this list to determine whether your organization needs to take any action.

- **Enhanced Password Protection:** We now use industry-tested and accepted hashing algorithms to encrypt and store user passwords. This provides stronger protection for user data as passwords are no longer stored in the database. However, no changes are required by your organization if your website uses standard password functionality in Blackbaud Internet Solutions.

  ***Note:*** If your organization uses a customization to integrate your website with a third-party single sign-on system, the customization may not work correctly. We recommend that you consult your single sign-on system provider to determine how the PA-DSS 3.2 requirements may affect your integration with Blackbaud Internet Solutions.

- **Site-Wide Secure Pages:** Previously, you could require encryption for all pages, secure content, or administration pages in *Sites & settings*. Now, Blackbaud Internet Solutions requires encryption for

all pages on your website to provide site-wide security and protect your users' connections to your website. The URLs for all Blackbaud Internet Solutions web pages use “https" to securely render the pages via Transport Layer Security (TLS) protocol. This provides three layers of protection: encryption, data integrity, and authentication.

***Note:*** If your web pages incorporate content from non-secure sites, the content may not display or website users may receive a warning that the site has mixed content. This occurs because the Blackbaud Internet Solutions page uses a secured HTTPS connection, but some of the content on the page is referred by a non-secured HTTP URL. Non-secure content can be located in Formatted Text or Unformatted Text parts, the page layout, or the site style sheet. To correct this issue, identify affected parts and change the URL for the external content to a secured HTTPS connection.

- **Improved Security for Testconfig Page:** Testconfig is a page on your Blackbaud Internet Solutions website that reveals helpful information about your site's configuration, product versions, server-to-server connectivity, and more. To improve its security, testconfig.aspx is now accessible only from your local server.

# JQuery Version Upgrade

With this release of Blackbaud Internet Solutions, we have upgraded the JQuery version from 1.7.2 to 1.12.3.

# Support for International State Fields

Blackbaud Internet Solutions now uses existing CRM address formats to determine whether to display or hide the **State** field on all web pages that allow users to enter address information.

Previously when entering addresses for any nationality, the **State** field always displayed, except for the UK, Australia, and New Zealand. Now, if a **State** value does not apply to the selected country, the **State** field is hidden on the web pages. If the **State** value is in CRM international address formats for the selected country, then the **State** field is visible on the web page and is required by Blackbaud Internet Solutions.

***Note:*** The **State** field still displays for the United States, United Kingdom, Australia, New Zealand and Canada even if the **State** or **State Abbreviation** value is not included in the address format in CRM.

This enhancement was made to the following Blackbaud Internet Solutions parts:

- Donation Form
- User Login Form
- Payment 2.0 Form
- Event Registration Form
- Profile Update Form

## Upcoming Change for Email Forwarding

With Email Forwarding, website users could sign up and create a lifelong email address that is forwarded to an email address that they select. This functionality was provided in Blackbaud Internet Solutions via the Email Forwarding Form.

We have reviewed email forwarding needs and concluded that alumni and other users will be better served by other email forwarding vendors that provide more advanced capabilities. For example, solutions like Google's G-Suite (https://gsuite.google.com) offer full email hosting services for your domain, including email forwarding.

In light of our research, we recommend that your organization transition from the program's built-in email forwarding functionality to an alternate solution, such as that included with Google's G-Suite, in early 2017.

Blackbaud customer support representatives can assist you with retrieving the list of website users who have currently signed up for email forwarding. You can then use this list to implement an alternate solution of your choice.

# Service Pack 11

# Event Registration Form

This service pack includes a new Event Registration Form part with functionality improvements and usability enhancements to both the Edit Part screen and the web pages that the part generates on your website.

New functionality improvements for the part include increased support for appeal and campaign data and integration with event preferences. Usability enhancements include better organization of the part's design options to avoid scrolling, and help text improvements to clarify what appears on the page. For website users, usability enhancements include a simplified registration process that has been reduced to three steps and numerous quick links so users can autofill registrant data.

***Show Me:*** Watch a video about the new Event Registration Form part.

## Event Registration Form (Classic)

The original Event Registration Form part is now called Event Registration Form (Classic). It does not upgrade to the new event part and remains available to use on your website with its original design. There are a few features the Event Registration Form (Classic) includes that the new Event Registration Form Edit part does not, such as Payment 2.0 part integration and the ability to link to another page from the event. You may want to consider this when you create the new part.

## Event Registration Form: Website

When you include the new Event Registration Form part on a page in *Site explorer*, the registration options appear on three separate pages on your website. Each page includes a status bar so website users can view their progress as they complete the event registration process. Users can click the button in the status bar to go to the previous or next page.

***Note:*** The Step 3 *Payment* button appears when a user selects a paid event type on the Step 1 *Selection* page and then clicks **Continue**.

**Step 1 Selection** — The first page of the event registration process displays event details from Blackbaud CRM such as the descriptions, start dates, and times for events. Website users select events to attend and the number of registrants, and if you include a field for donations, they can also make additional gifts. The summary of the user's selections displays at the bottom of the page and dynamically updates as the user enters information.

**Step 1 Selection** | Step 2 Registration

## Afternoon Tea

Saturday June 20 — 2:00 PM - 5:00 PM

We will be meeting at the playground site for a brief meeting and introduction. We will then be taking the shuttle to Cobblestone House for tea and desserts

| Category | Quantity | Price | |
|---|---|---|---|
| **Child**<br>1 registrant | 0 | $50.00 | |
| **Adult**<br>1 registrant | 2 | $75.00 | |

## Winter Ball

Monday December 20 — 5:00 PM - 9:00 PM

Winter Ball to be held at the People's Palace

| Category | Quantity | Price | |
|---|---|---|---|
| **Corporate Sponsor**<br>1 registrant | 0 | $225.00 | |
| **Individual**<br>1 registrant | 2 | $100.00 | |

**Event registration summary**

| | | | |
|---|---|---|---|
| Afternoon Tea: | Adult | 2 | $75.00 |
| Winter Ball: | Individual | 2 | $100.00 |
| **Total:** | | | **$350.00** |

**Continue**

**Step 2 Registration** — On the second page, website users enter details for all registrants. To copy contact information, users can select **Use this address for all registrants** and click **Apply to all registrants** for certain fields. After users enter registrant information for an event, links for the registrants appear on the next event, and users can click the links to autofill registrant information.

In the following screenshot, you can view the checkboxes and links that allow users to autofill additional registrant information.

Step 1 Selection | **Step 2 Registration** | Step 3 Payment

## Afternoon Tea

***Saturday June 20 2:00 PM - 5:00 PM***

We will be meeting at the playground site for a brief meeting and introduction. We will then be taking the shuttle to Cobblestone House for tea and desserts

Afternoon Tea

**Registrant 1 - Adult**

First name: Elizabeth

Last name: Smith * Apply to all registrants

Email: esmith@abc123.org Apply to all registrants

Phone: Apply to all registrants

**Address**

Country: United States *

Address lines: 124 Maple Street *

City: Charleston *

State: SC *

ZIP: 29492 *

☑ Use this address for all registrants

☑ Use this as my billing information

Afternoon Tea

**Registrant 2 - Adult**

☐ Register later (The guest can provide this information when checking in to the event.)

First name: Julian

Last name: Smith * Same as above

Email: jsmith@abc123.org Same as above

Phone: Same as above

☐ Use this as my billing information

In the following screenshot, you can see that in addition to the checkboxes and quick links that are available on the first event, the next event also includes links for previously entered registrants. When users click these links, registrant information autofills in the registrant's box.

# Winter Ball

***Monday December 20 5:00 PM - 9:00 PM***

Winter Ball to be held at the People's Palace

Winter Ball

**Registrant 1 - Individual**

Same as a previous registrant?

Elizabeth Smith  Julian Smith

First name: Elizabeth

Last name: Smith *  Apply to all registrants

Email: esmith@abc123.org  Apply to all registrants

Phone:  Apply to all registrants

**Address**

Country: United States *

Address lines: 124 Maple Street *

City: Charleston *

State: SC *

ZIP: 29492 *

☑ Use this address for all registrants

☐ Use this as my billing information

Winter Ball

**Registrant 2 - Individual**

Same as a previous registrant?

Elizabeth Smith  Julian Smith

☐ Register later (The guest can provide this information when checking in to the event.)

First name: Julian

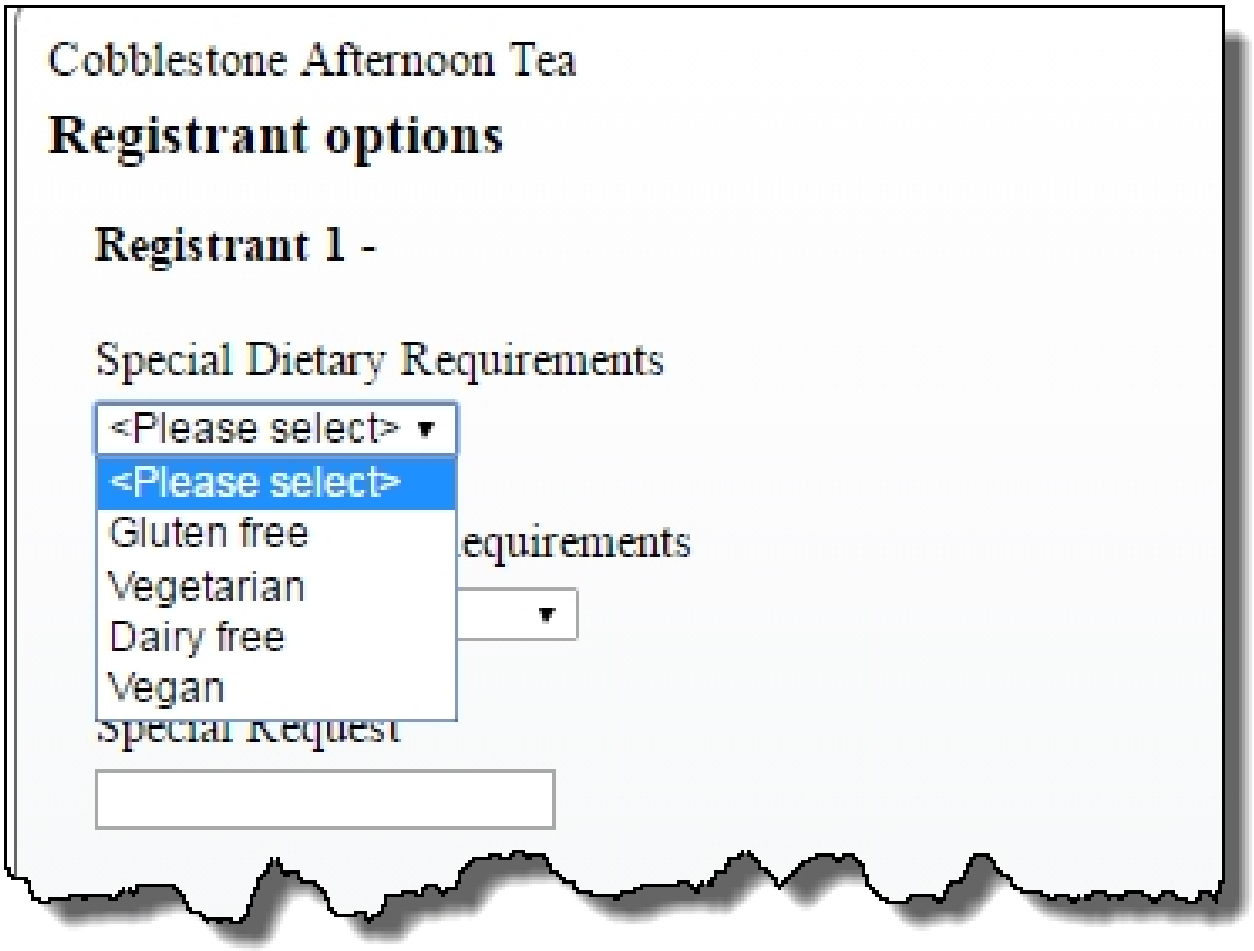
Last name: Smith *  Same as above

Email: jsmith@abc123.org  Same as above

Phone:  Same as above

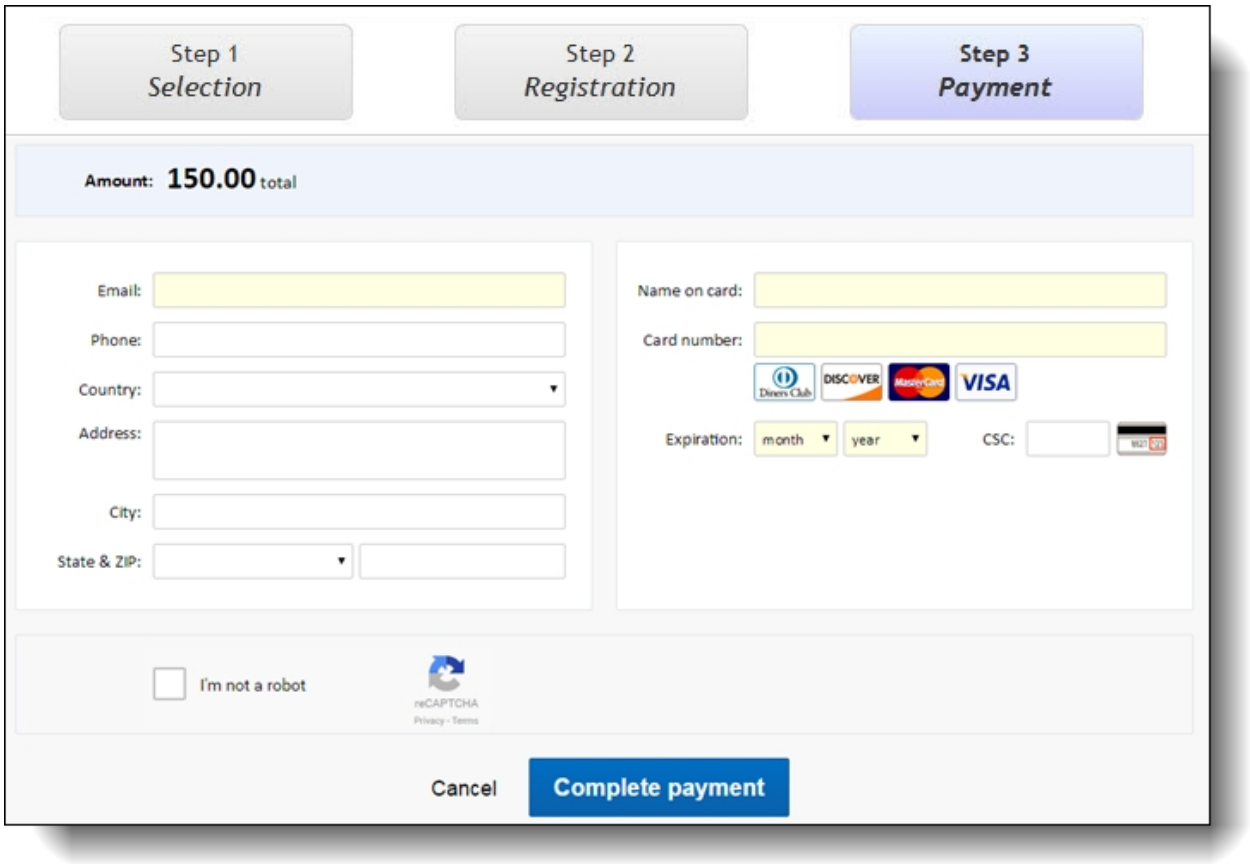
☐ Use this as my billing information

The user also selects applicable options for the event depending on the details you select to include on the part. For example, if you select to include an event preference for dietary requirements, the user may select vegetarian.




**Step 3 Payment** — On the third page of the event registration process, the program renders the secure payment page on the Blackbaud server to process transactions for event registration payments. When website users select multiple events with multiple charges, the total cost automatically defaults on the secure payment page. For information about the secure payment page, refer to the *Parts Guide*.

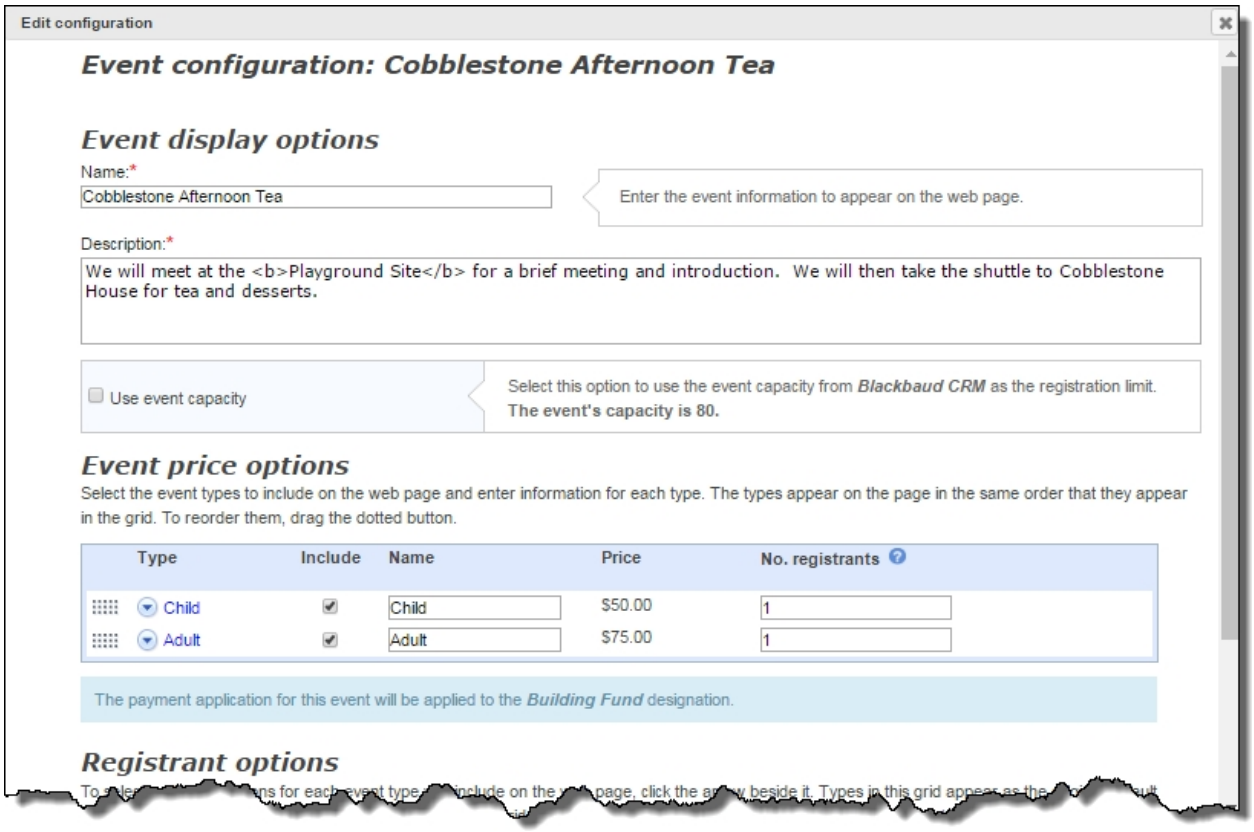
***Note:*** When you include free events on the part and a website user only registers for free events, this page does not appear.



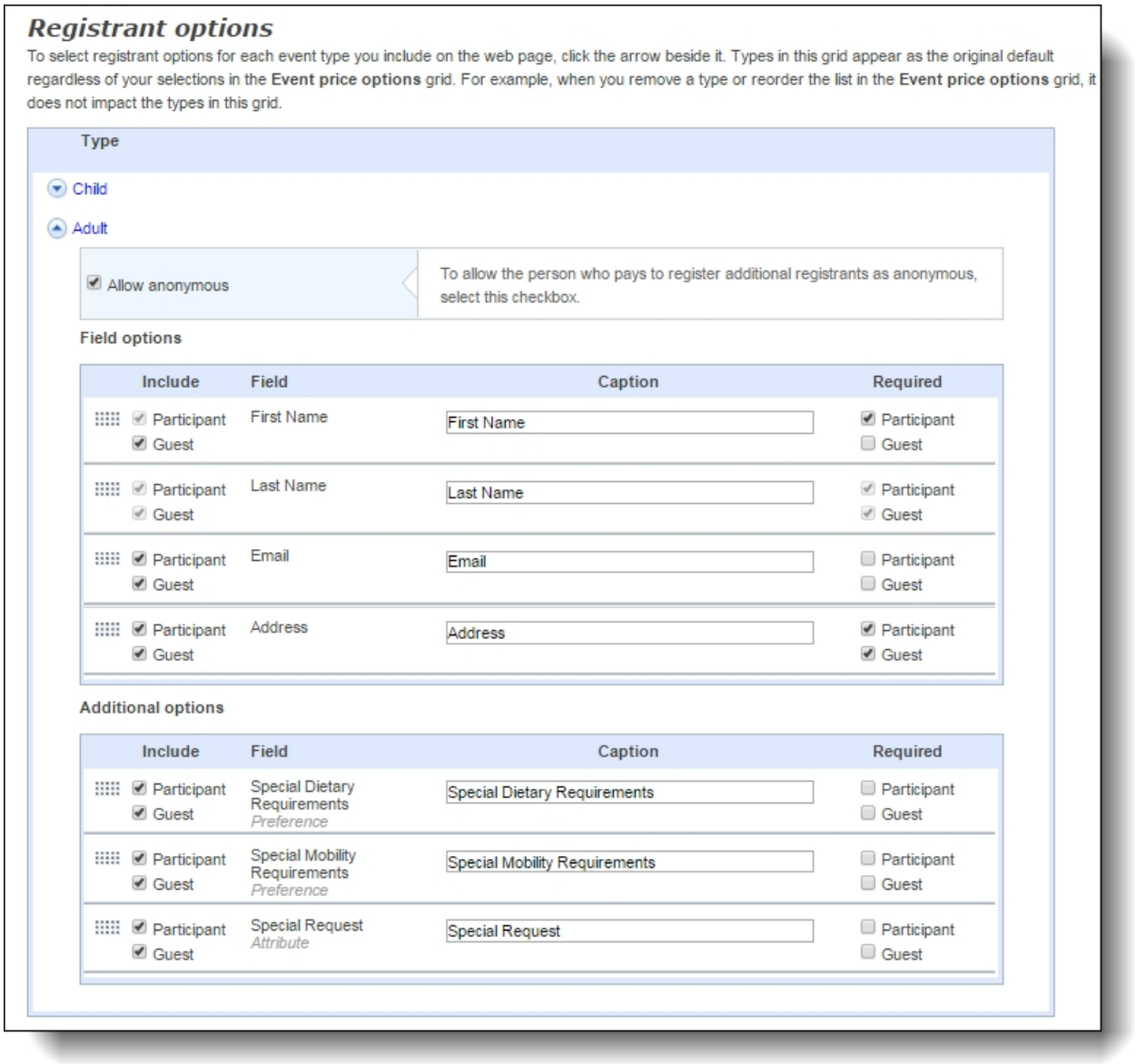

When users submit event registrations, event transactions download into the BBIS Event Registration Transaction Batch type in Blackbaud CRM. After you process transactions, event registration data appears on the applicable records in Blackbaud CRM. For information about event registration transactions and where data maps to in Blackbaud CRM, refer to the *Web Transactions Guide*.

## Event Registration Form: Edit Part

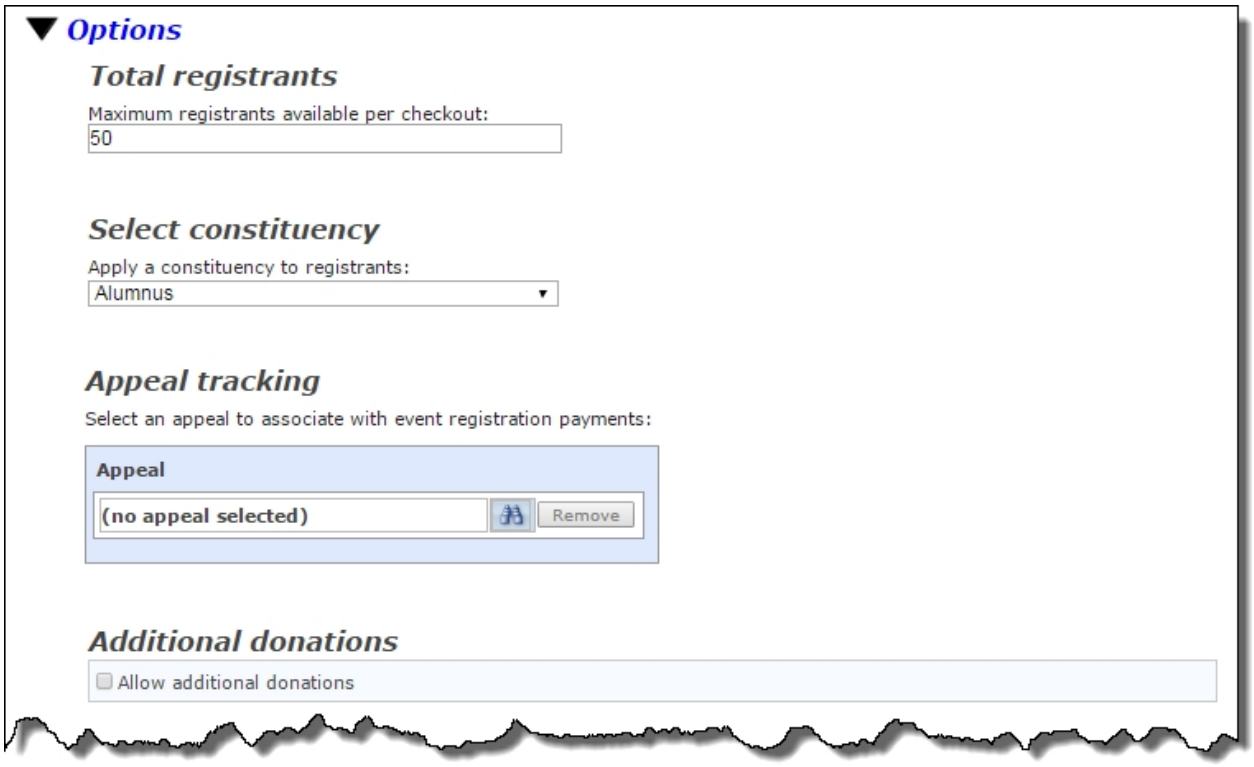
When you design the new Event Registration Form part, you now configure each event's options in its own configuration screen. You can enter text and HTML in the **Description** field and select **Use event capacity** to limit the maximum number of registrations based on the event record's capacity in Blackbaud CRM. The **Event price options** grid includes new column headers and help text to clarify what appears on the web page. You can also sort the event types in the order you want them to appear on the page.



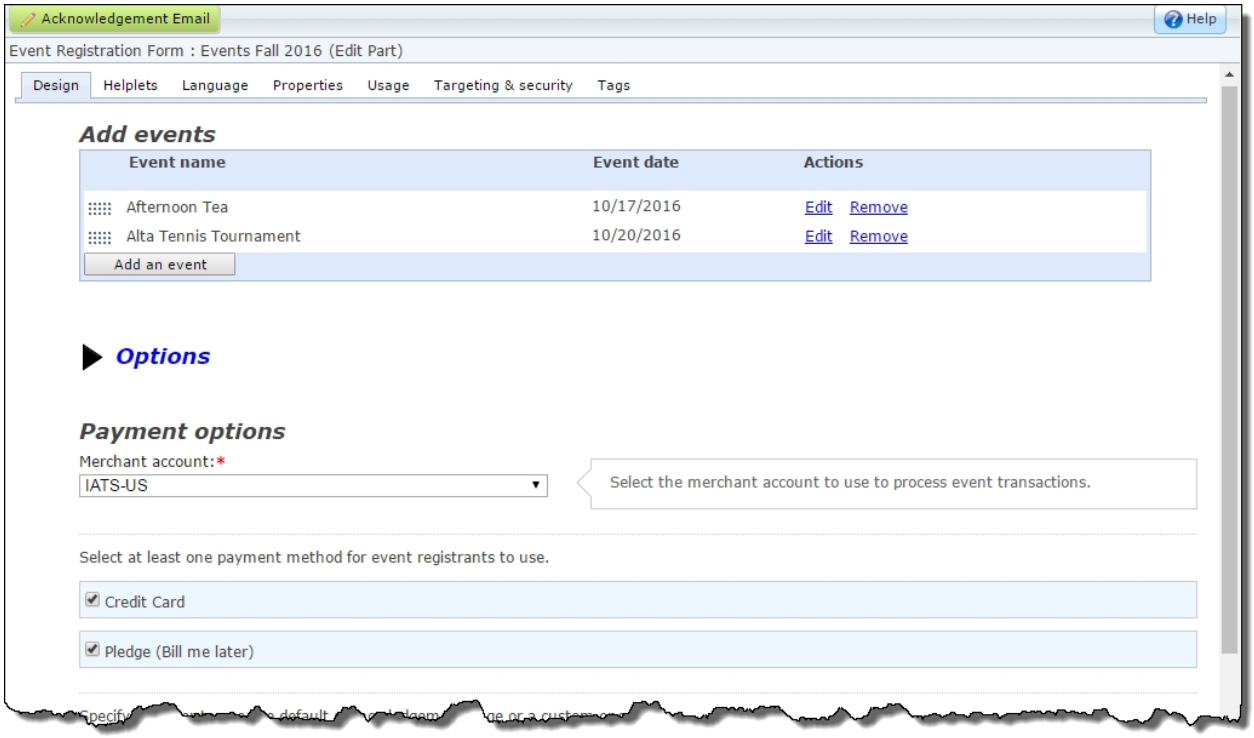

Under **Registrant options**, you can expand each event type and select whether to let users register additional guests as anonymous. You can also select and reorder biographical fields and additional options that will appear on the registration page. In response to your feedback in the idea portal, the part now also integrates with preferences from the event record in Blackbaud CRM. Event preferences are listed with participant attributes under **Additional options**. In both grids, you can change the text that displays in the **Caption** field. In the **Include** and **Required** columns, select which fields to display and require for primary registrants and their guests.




When you click **Options**, important options appear for the part such as how many people can be registered in one web transaction and which constituent code to apply to registrants. You can also select an appeal to associate with registration payments and specify whether to include a field for additional donations on your registration page. In this section, you also select how you want free events to appear on the page.

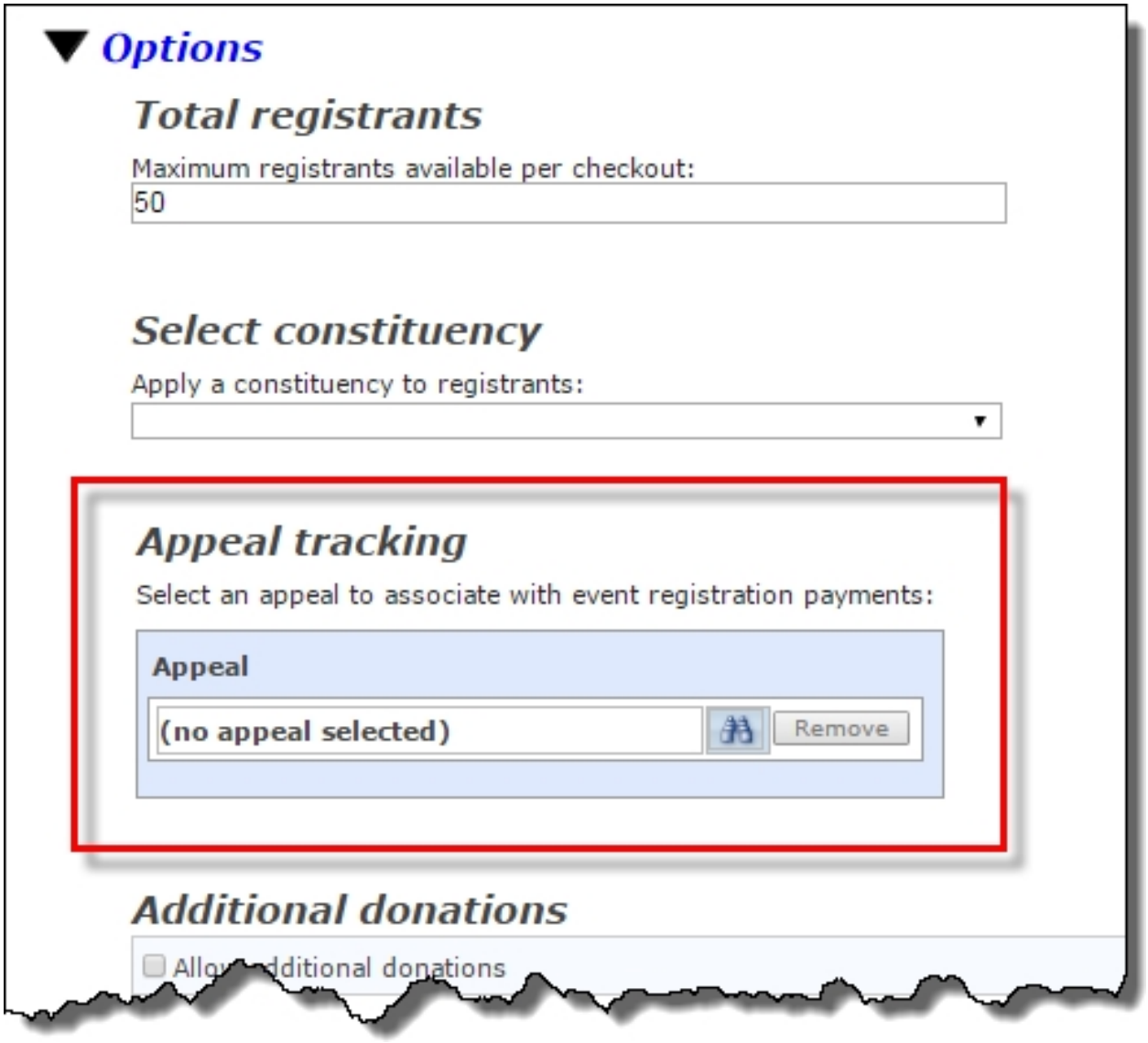



When you create a new Event Registration Form or edit it, the Edit Part screen is condensed by the event configuration screen and the **Options** link. This greatly enhances your ability to view the part so you can quickly identify the area to make your changes.



# Appeal and Campaign Tracking for Events

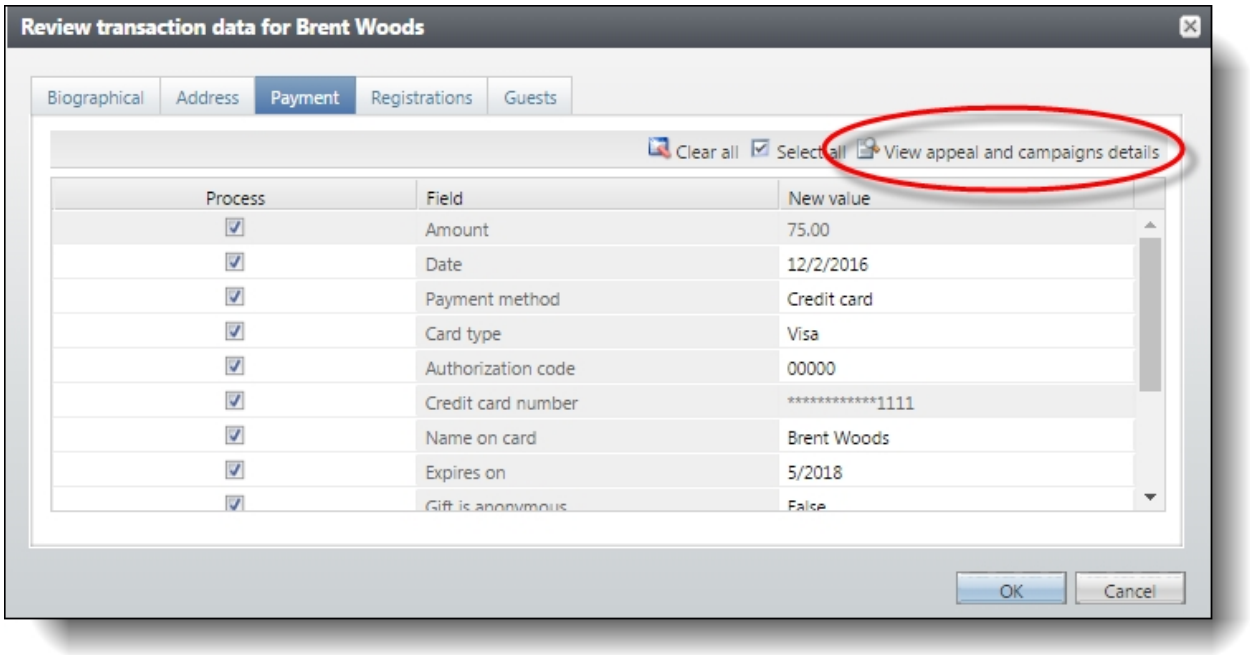
On Event Registration Form parts, you can now select appeals from Blackbaud CRM to associate with event registration payments. From the Design tab, under **Options**, a new section for **Appeal tracking** displays.



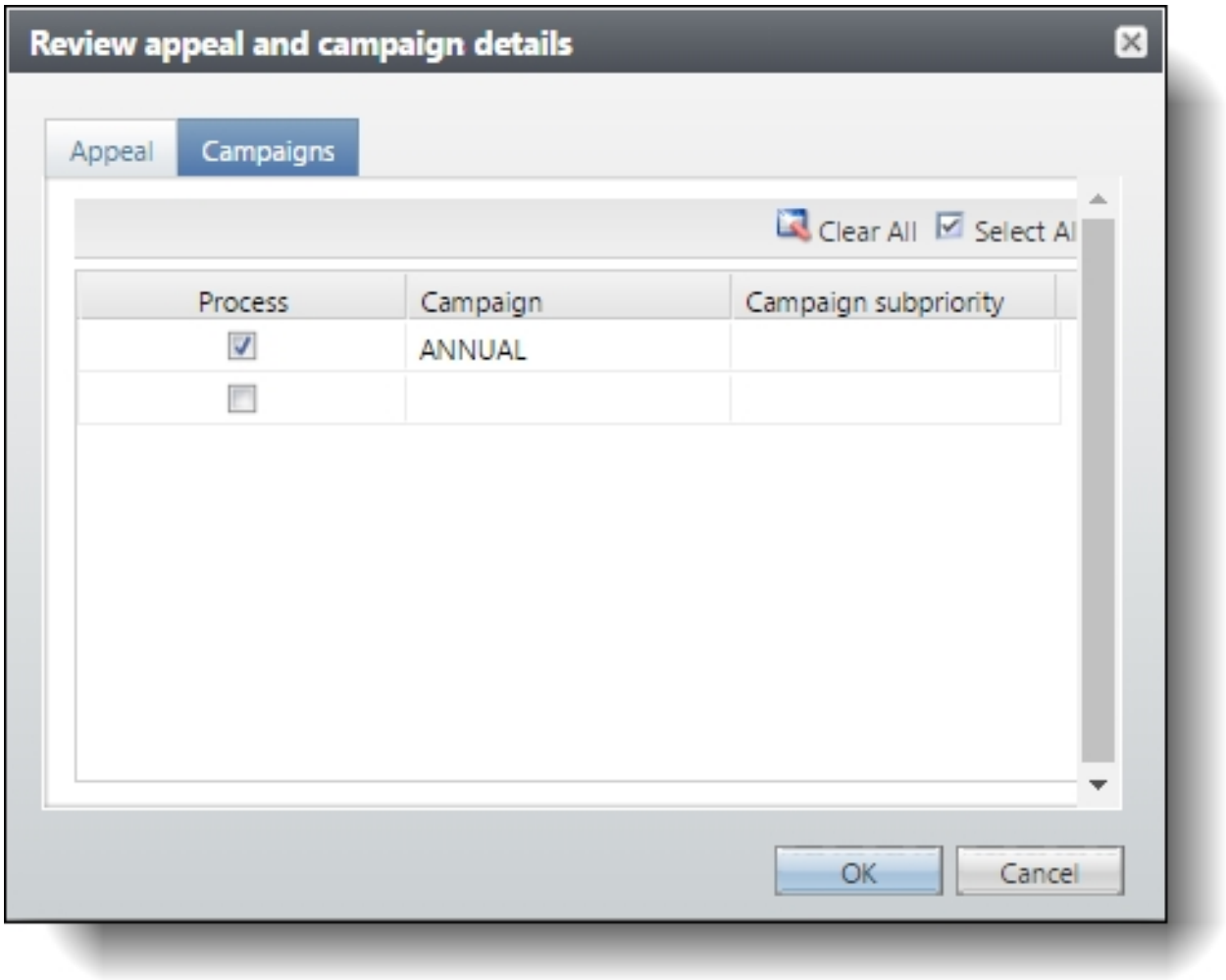

***Note:*** If an Event Registration Form part includes only free events, the **Appeal tracking** section is grayed out.

To select an appeal, click the binoculars. Any appeals that are already associated with the event record in Blackbaud CRM display on the search screen. You can also click **Search** to view and select from all active appeals.

Event registration payments are automatically associated with campaigns that have been added to the event record in Blackbaud CRM. Within a BBIS Event Registration Transaction Batch in Blackbaud CRM, you can now modify the appeals and campaigns that are associated with event registration payments. When you review transaction details in an uncommitted batch, you can now click **View appeal and campaigns details** on the Payment tab.




In the window that opens, you can select the Appeal or Campaigns tab to review and modify the appeal and campaign selections for event registration payments prior to committing the batch.

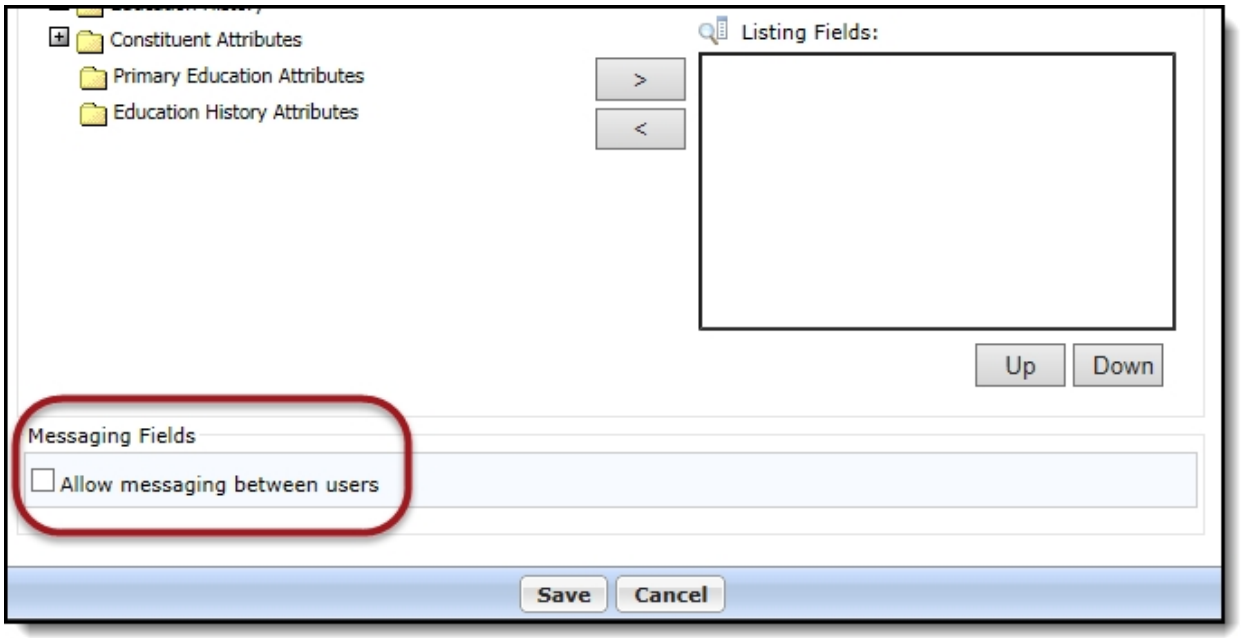



# Directory Private Email Messaging

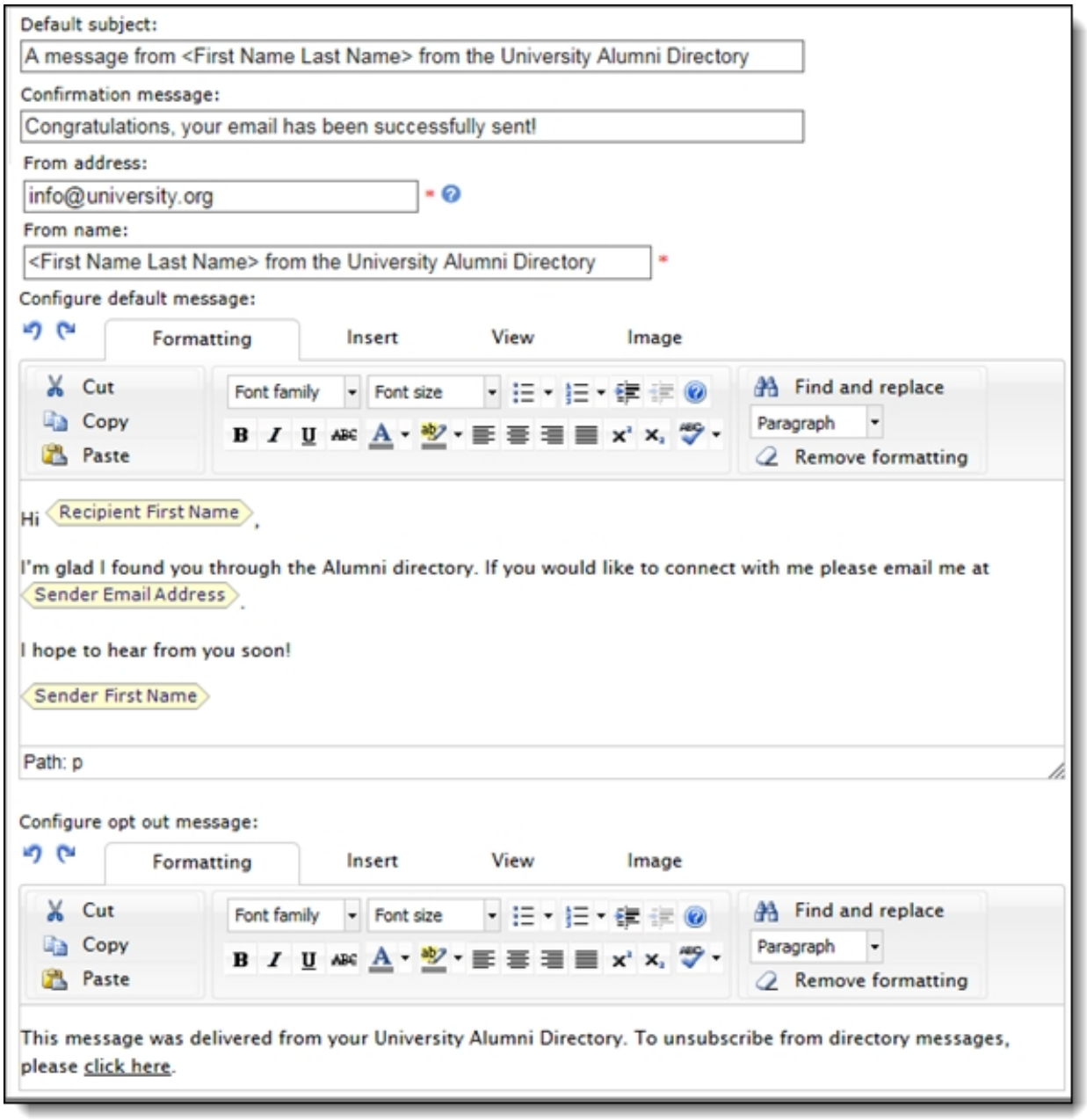
An enhancement was made to the Directory part in Blackbaud Internet Solutions that now enables alumni and other users to send messages to others in the directory without sharing their email addresses. This functionality is available only for website users who are logged in to Blackbaud Internet Solutions; anonymous users do not have the capability to use directory messaging.

***Note:*** A website user can send a maximum of 10 messages per hour. When this limit is reached, a message displays telling them to try again later.

On the Design tab of a Directory part, select **Allow messaging between users** to enable messaging.




When you select this option, additional fields display below the option so you can configure the message's default text, including the subject, email message, from address, from name, confirmation message, and opt out message.

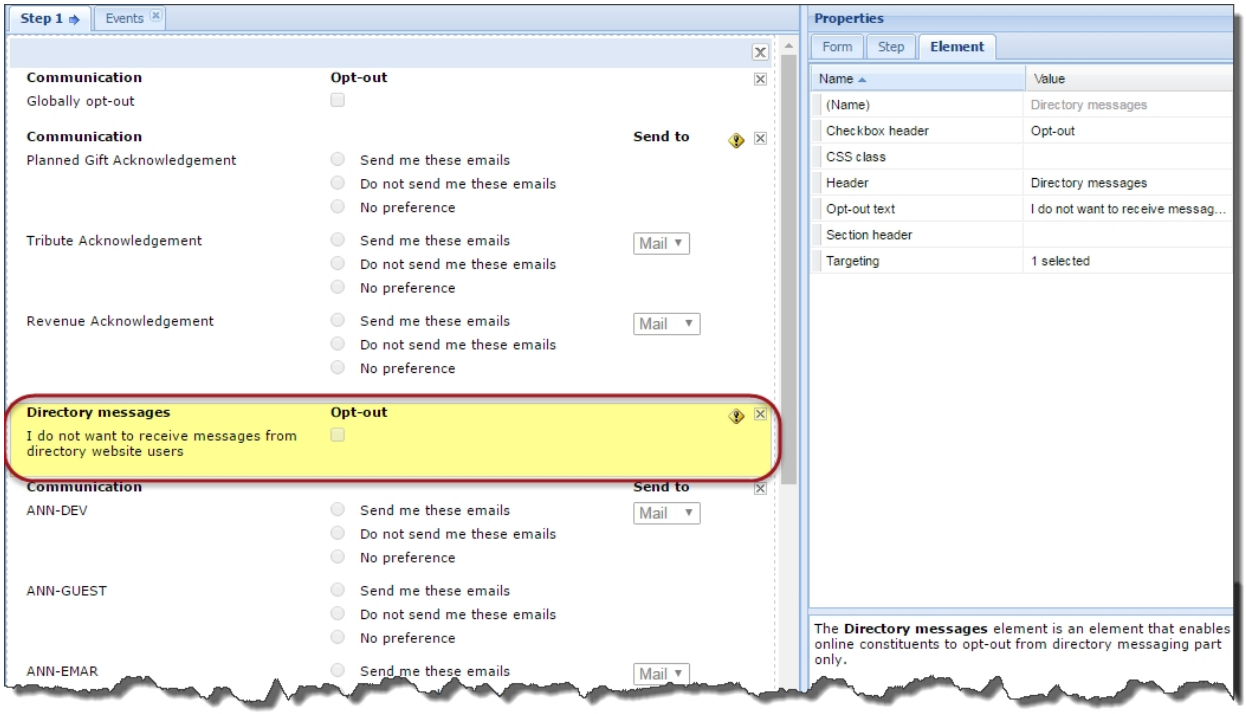



***Note:*** To avoid having the email rejected or considered spam, the **From address** must be an email address on a domain that the organization owns and controls. This is necessary as some email providers such as Yahoo and AOL have strict DMARC policies that reject any emails with a yahoo.com or aol.com email address that have not originated from those domains.

When messaging is enabled, an email icon ( ) displays in the directory's Messaging column for people who have a primary email address and have not opted out of messaging. To send a message, click  beside the recipient's name to display the message template. You can edit the message as desired, then click **Send message** to send the email. The email is sent via the organization to the

recipient, and the recipient's email address is not visible to the sender. A confirmation message displays when the email is successfully sent.

The Communication Preferences form was also updated to support opting out of receiving email messages sent from other directory users.




In **Directory messages**, select **Opt-out** to have a directory messaging opt-out checkbox display to users on their Communication Preferencesform. You can also enter text in the **Opt-out text** field on the Element tab to customize the text that displays for the option.

When users click the unsubscribe link in an email they receive via directory messaging, they are sent to their Communication Preferences form where they can select the directory opt-out option. Users can also clear this option if they had previously opted out and now want to resume directory messaging.

# Communication Preferences Form Enhancements

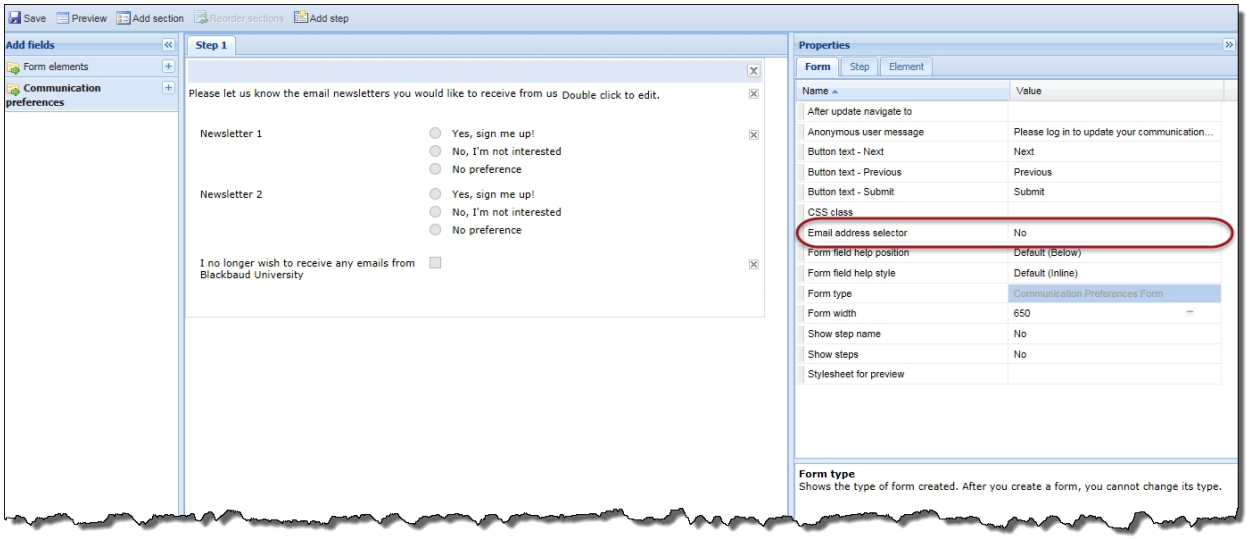
We've made some enhancements to the Communication Preferences form to provide functionality improvements to email communication preferences.

## New Email Address Selector Property

Previously, users had the option on the Communication Preferences form to specify which email address they wanted to use to receive email communications. Because some customers prefer not to

give users this choice, we've added the ability for administrators to disable the email selection option globally for all email types.

Use the new **Email address selector** property on the Form tab to configure whether or not to allow email address selection on the Communication Preferences form.




- Select **No** (default) if you do not want users to select an email address preference. The email selector does not display on the Communication Preferences form and the users' primary email address is used for all email communications.

  Because Blackbaud Internet Solutions does not honor the email address preference, it is recommended that if you use only Blackbaud Internet Solutions for email communications, select **No**.

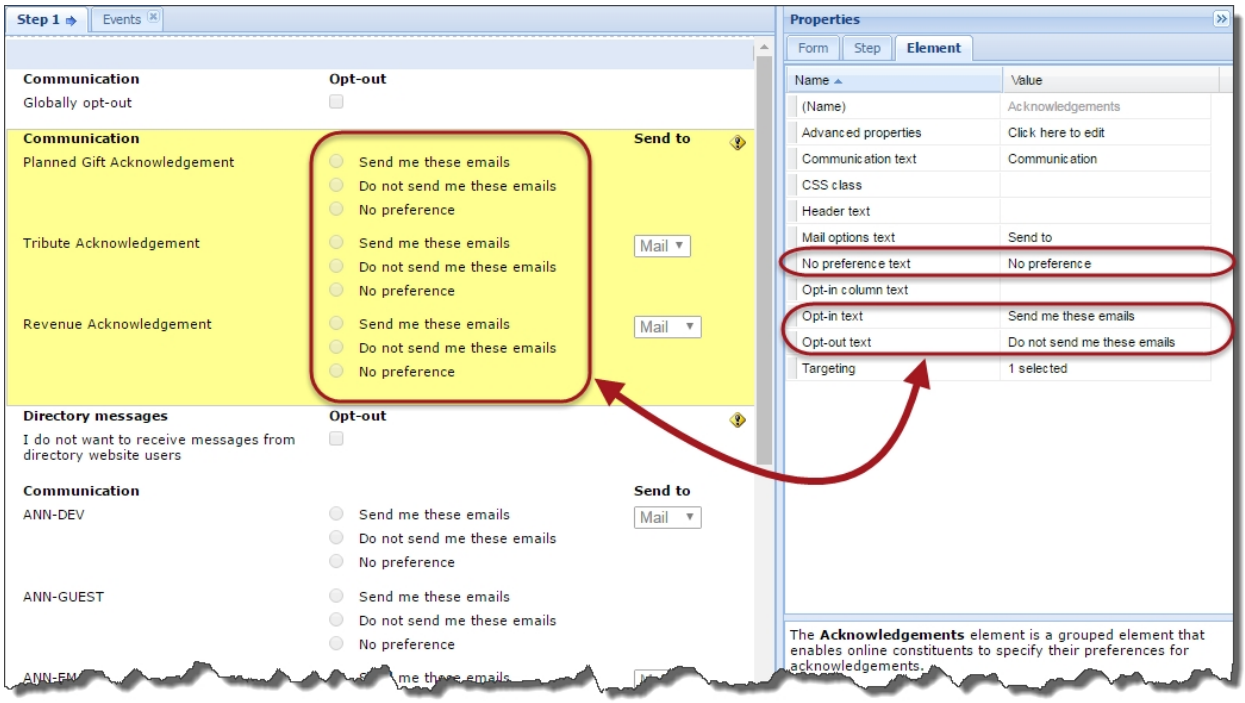
- Select **Yes** to allow users to select an email address preference. The email selector displays on the Communication Preferences form.

  Because Blackbaud Direct Marketing (BBDM) can honor the email address preference, it is recommended that if you use only BBDM for email communications, select **Yes** to allow email address selection.

***Note:*** If you use both Blackbaud Internet Solutions and BBDM for email communications, it is recommended that you select **No** for this option.

## New Email Opt-in/Opt-out Preferences

In an effort to offer more explicit options for online users, the email preference settings in Blackbaud Internet Solutions have been enhanced to specifically indicate whether users are opting in or opting out of email communications, or if they have no preference either way.



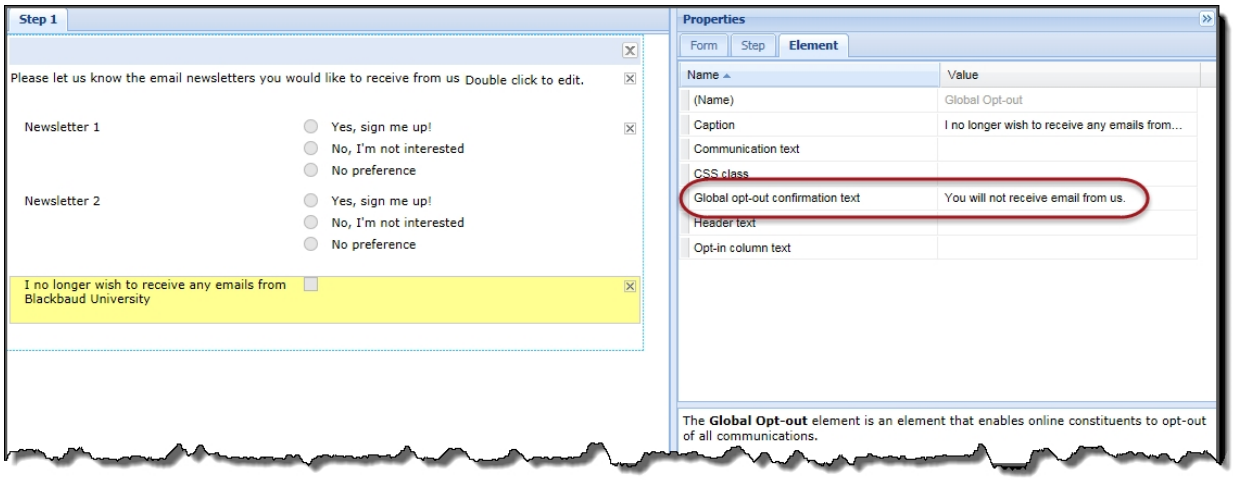

There are now three email preference options, Opt-in, Opt-out, and No preference, available for each communication type. This gives users the option to explicitly opt out of receiving a certain email type. Users who do not have a previously set choice in Blackbaud CRM will have their email preference options set to **No preference** by default. They can subsequently modify these preference settings on the Communication Preferences form and submit the changes.

You can use the Element tab to customize the text that displays to the users for each of the preference options. You cannot leave the text field blank for these options.

- **Opt-in**: Default text is *Send me these emails*.
- **Opt-out**: Default text is *Do not send me these emails*.
- **No preference**: Default text is *No preference set*.

## Global Opt-Out Confirmation Text

The global opt-out option allows users to opt out of all communication from your organization. We've added the ability to include text for a confirmation message that displays in red beneath the global opt-out option when users select it.




On the Element tab, use the **Global opt-out confirmation text** property to specify the text you want to display when users select the global opt-out option. The default text for the confirmation message is *You will not receive email from us*. You can edit the text to customize your message or you can leave this field blank if you do not want to display a confirmation message.

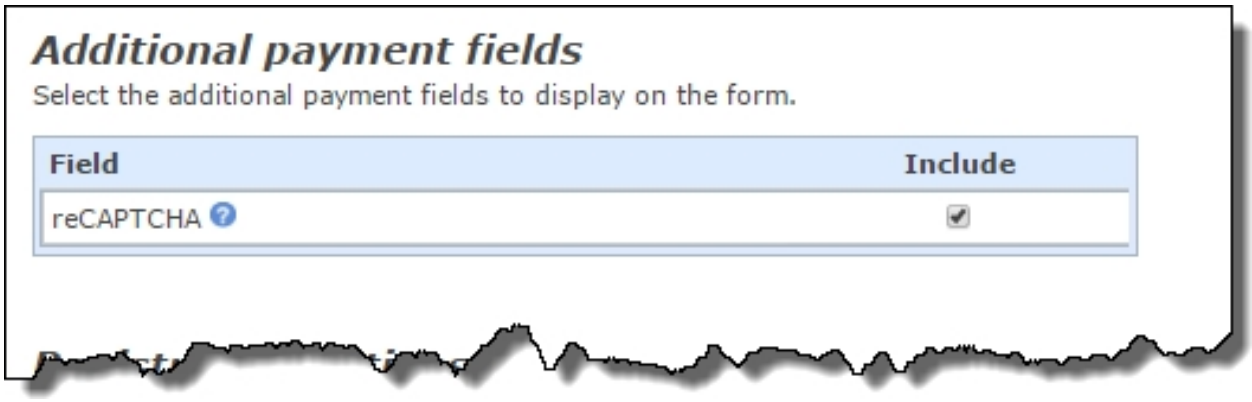
# Updated reCAPTCHA

When you enable *reCAPTCHA* in *Administration*, Blackbaud Internet Solutions displays 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.

Previously, the program displayed distorted text that users were required to type into a box. To simplify the experience, the program now displays a checkbox labeled "I'm not a robot." Users can select the checkbox to proceed.

***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.

The *reCAPTCHA* options you select in *Administration* control all parts in Blackbaud Internet Solutions except the Advanced Donation Form, Event Registration Form, and Payment 2.0 parts that use the Blackbaud Secure Payments form. Those parts now include an **Additional payment fields** section on the Design tab where you can select to include *reCAPTCHA*.




When you include this option, a *reCAPTCHA* checkbox displays below credit card payment fields on your Blackbaud Secure Payments form. Users must select the *reCAPTCHA* checkbox before they can submit the form.

***Note:*** If your *reCAPTCHA* keys no longer work with the updated version, the site administrator can go to http://www.google.com/recaptcha to obtain new public and private keys, and to register the site domains.

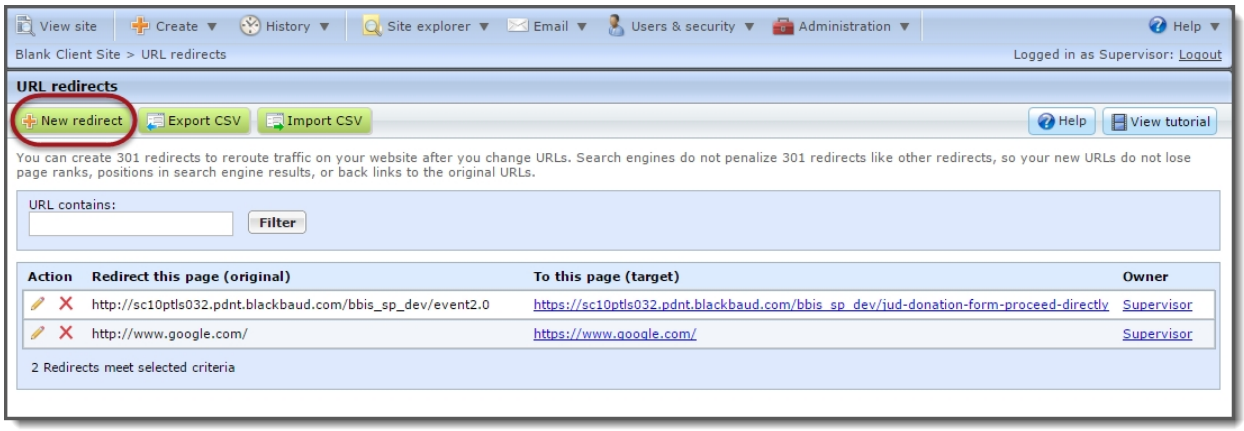
# URL Redirects

We've improved our URL redirect implementation to ensure that browser search engines correctly handle your redirected pages.

Previously, when administrators added a new redirect to forward an http URL to an https URL, a 302 redirect was created. Since 302 redirects are considered temporary, this was causing issues with the page indexing by Google's search engine.

Now, our modification to the redirect functionality creates 301 redirects, which are considered as permanent page moves. Since search engines do not penalize 301 redirects like they do with other types of redirects, your new URLs do not lose page ranks, positions in search engine results, or back links to the original URLs.

To create a URL redirect, go to *Administration* > *URL redirects*, then click **New redirect**.




# Service Pack 12

# Donation Form - Mini (Beta)

The Donation Form - Mini (Beta) part is our beta release of a new Blackbaud Internet Solutions donation form that provides a new simplified checkout experience for campaign-based donations. The form has a modern, responsive HTML design that automatically adjusts to the device size, such as a smart phone or tablet, on which the page is being viewed.

This new form allows donors to make a quick, basic donation by selecting a predefined giving level or, if configured, to enter their own gift amount. Because the form uses PCI-compliant Blackbaud Checkout, customers can be assured that credit card and merchant account information is processed and stored on a Blackbaud-hosted secure server.

Digital wallet options are available on the Donation Form - Mini (Beta) part for BBMS customers *only*.

Visa Checkout and Masterpass are automatically available to donors as secure checkout options. Both support the same currencies as BBMS: USD, CAD, GBP, and EUR.

Apple Pay is now available to donors as a secure checkout option. Previously, this was only available for organizations in the Apple Pay Early Adopter Program (EAP); now it is Generally Available.

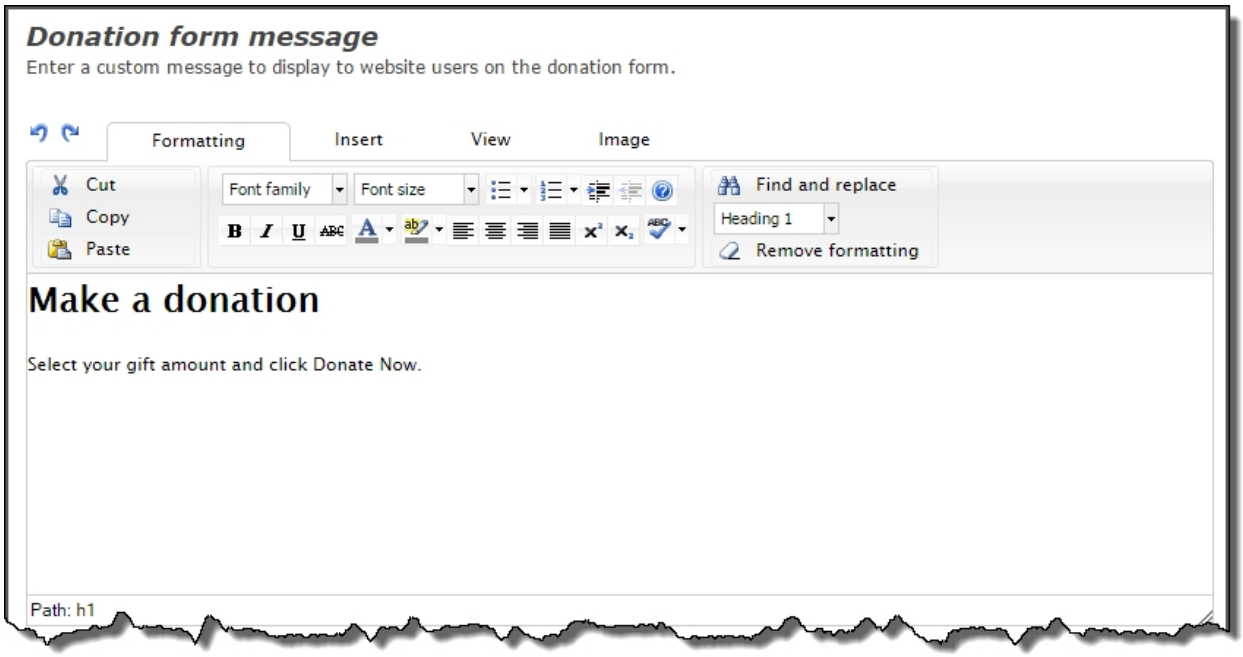
***Note:*** eReceipts are not supported with the Donation Form - Mini (Beta) part.

***Note:*** The Donation Form - Mini (Beta) part is considered a proof of concept and will transform into a full donation form in an upcoming Blackbaud Internet Solutions release.

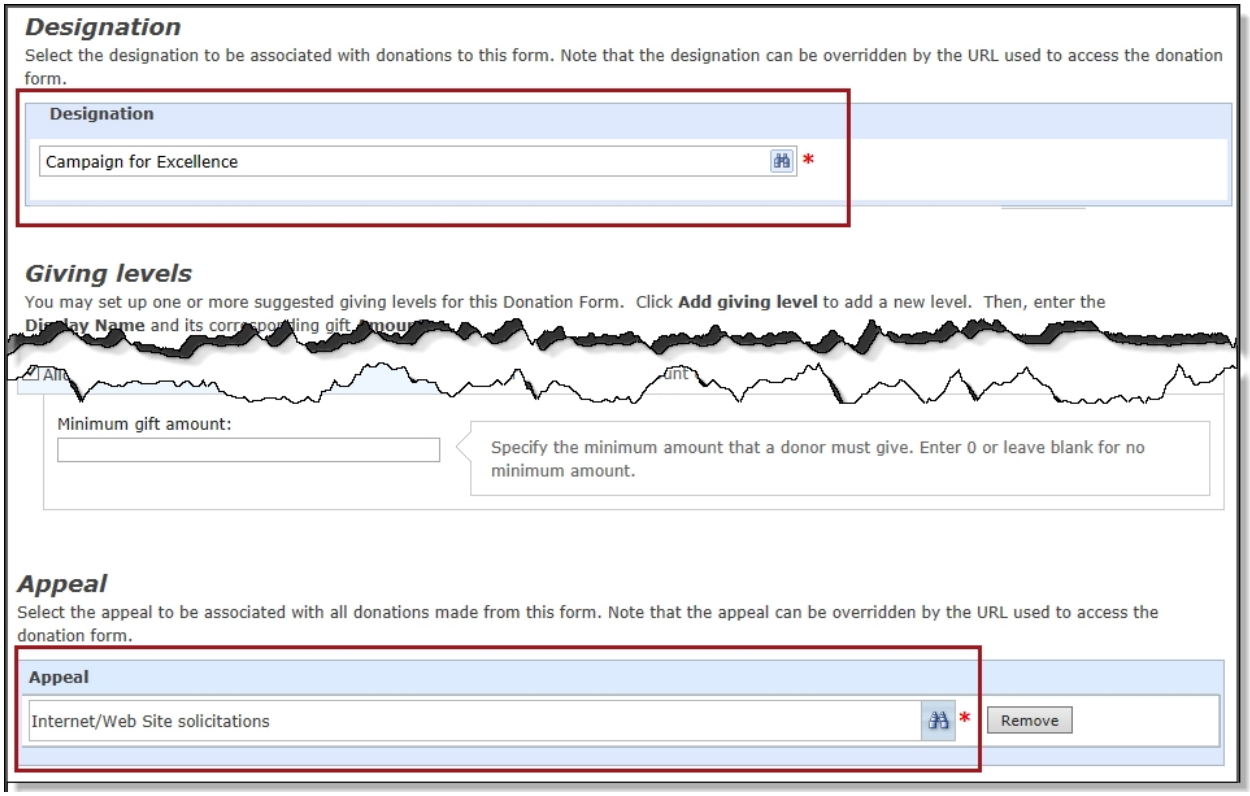
## Design the Form

Use the **Design** tab for the Donation Form - Mini (Beta) part to configure the form and customize it for your organization.

In the **Donation form message** section, you can use the HTML editor to create a custom message to display on the form or you can use the default message.



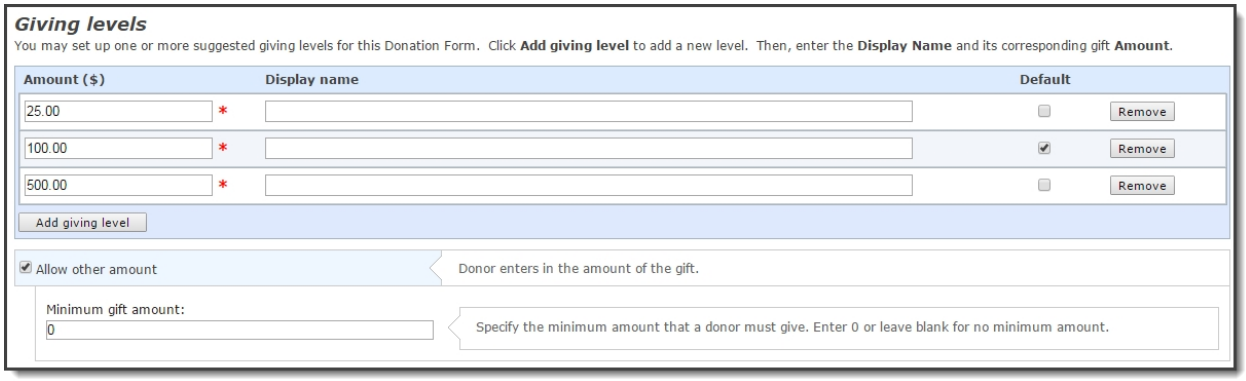

In the **Designation** section, select the designation that you want associated with donations made using this form. In the **Appeal** section, click **Add appeal** to search for and select the appeal that you want associated with the donations made using this form.



***Note:*** The designation and appeal can be overridden by the URL used to access the donation form. You format this URL as https://www.yourdomain.org/donate-now?aid=*Appeal system record ID*&did=*Designation system record ID*.

You can find the appeal and designation system record IDs to include in the URL by creating an ad-hoc query in Blackbaud CRM. In Analysis > Information Library, click **Add an ad-hoc query** on the Queries tab. In the Select a Source View window, select **Appeal** in Record type and in **Source view**, then click **OK**. In Select filter and output fields, select **Appeal record** and any other query criteria, and add to **Results fields to display**. Click the **Preview results** tab. For the desired appeal, copy the corresponding system record ID. This is what you'll use in the URL for the *Appeal system record ID*. To locate the *Designation system record ID*, create another ad-hoc query and follow the steps above, substituting **Designation** for **Appeal**.

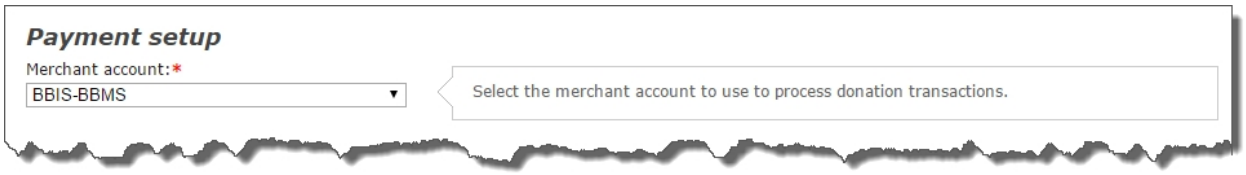
Under **Giving levels**, you can set up suggested giving levels to display on the donation form. By default, three best practices giving levels of $25, $100, and $500 are specified. You can change these amounts, and add or remove giving levels as desired. There must be a minimum of one giving level on the form. Optionally, you can include a name to display on the form for any of the giving levels, and specify a giving level as the **Default** so it's preselected on the donation form.



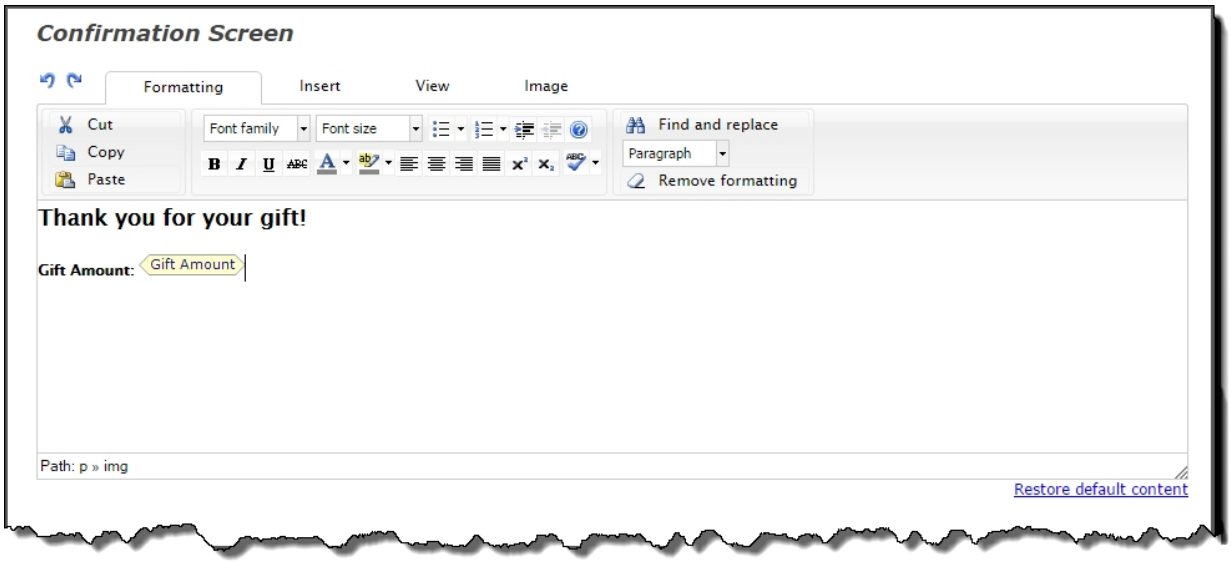

You can also allow users to specify another gift amount by selecting the **Allow other amount** option, then entering a **Minimum gift amount** that donors can contribute.

In **Payment Setup**, select the merchant account to use to process donation transactions.

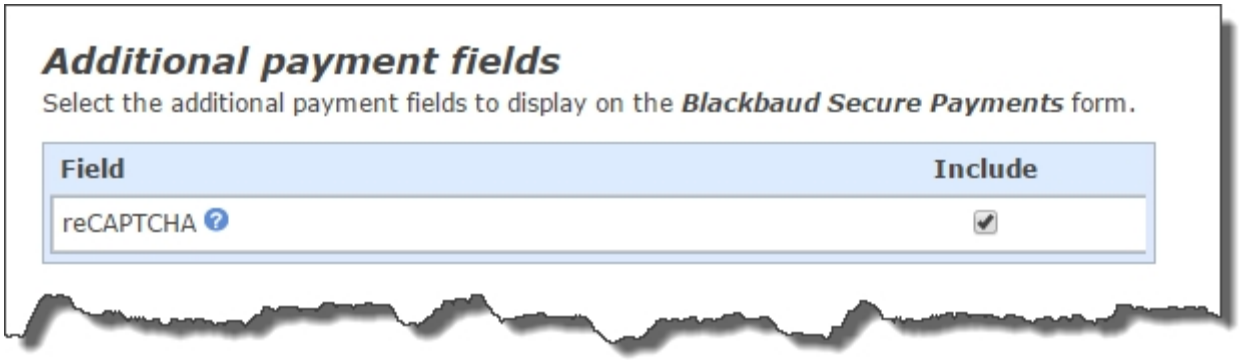
***Note:*** All merchant accounts support the Donation Form Mini - (Beta) part except for iATS and IP Payments. iATS and IP Payments display as disabled in the **Merchant account** list.




The default confirmation message that displays to donors after their payment is made shows under **Confirmation Screen**. You can customize this content according to your organization's needs. Note that **Amount**, **Designation**, and **Appeal** are the only merge fields that can be displayed on the confirmation screen.



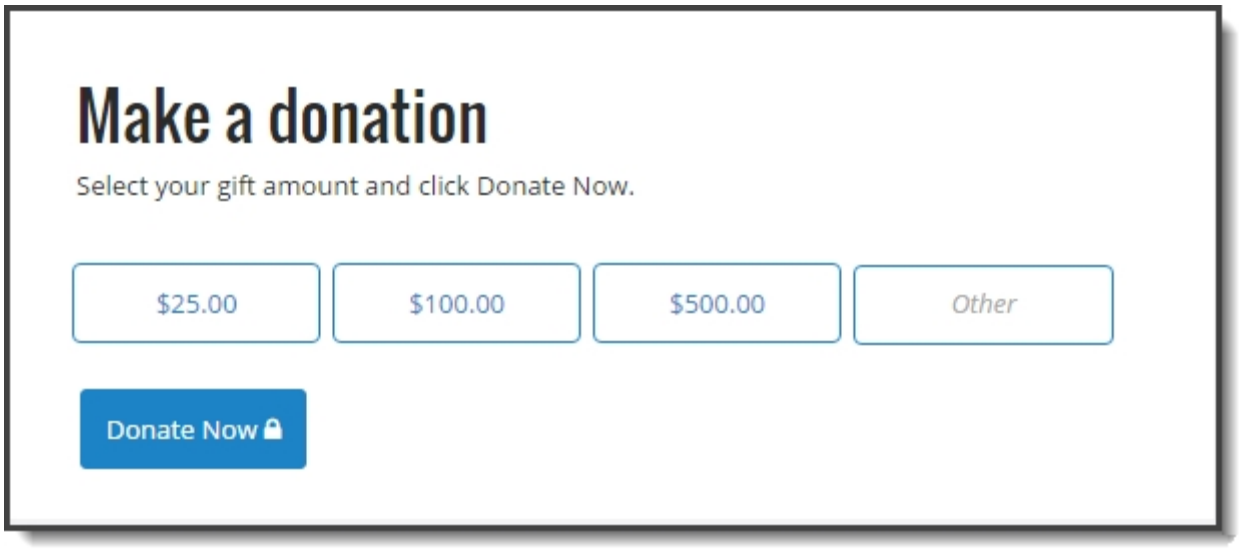

Optionally, under **Additional payment fields**, you can select to display a *reCAPTCHA* checkbox on your Blackbaud Secure Payments form below the credit card payment fields. Users who are not logged in to your site must select the *reCAPTCHA* checkbox and perform the reCAPTCHA challenge before they can submit the form.




## Use the Form

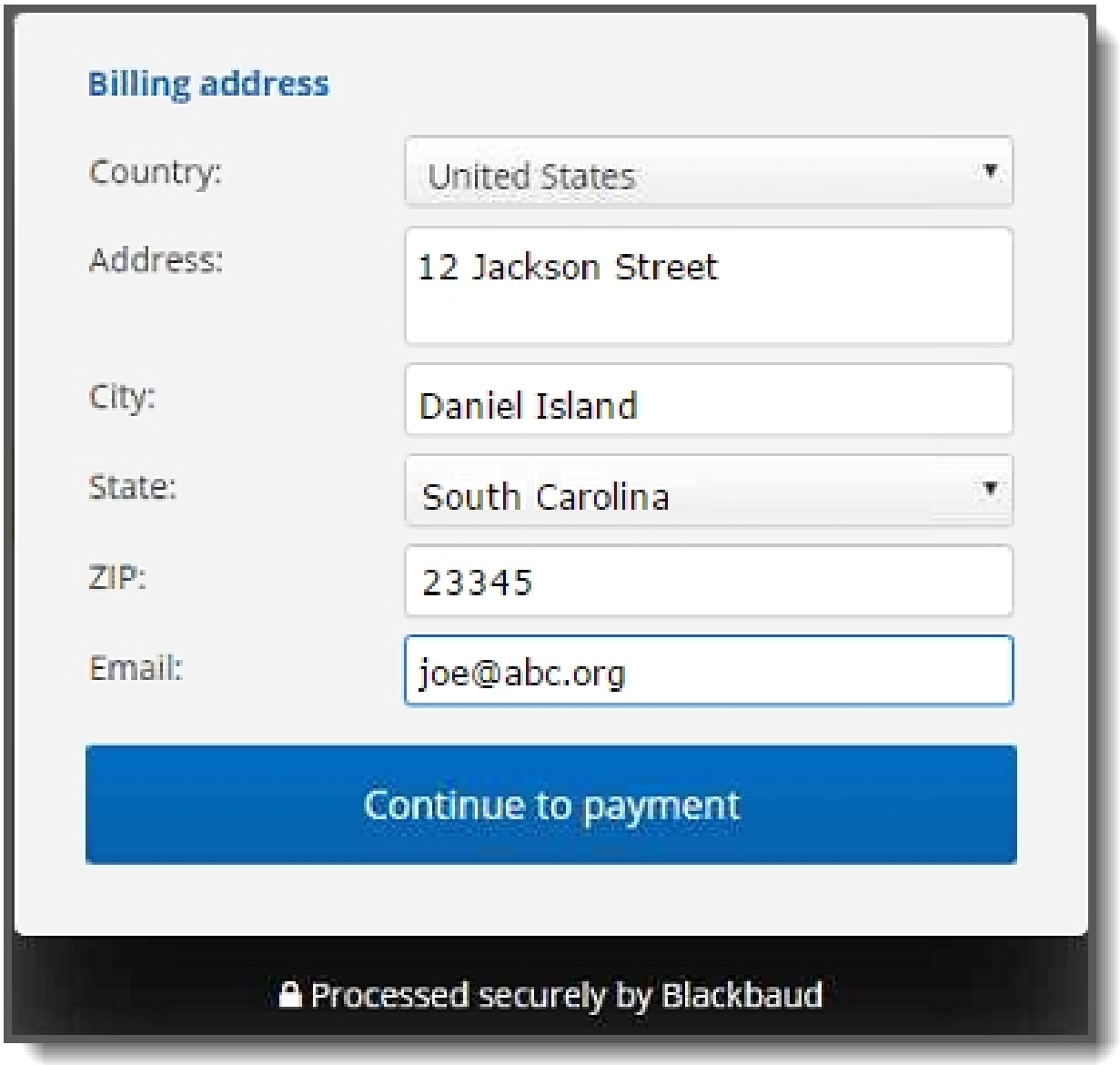
On your website, the Donation Form - Mini (Beta) part displays as shown in the example below.

***Note:*** Due to the donation form's responsive design, it automatically adjusts to the device size on which it is viewed and may look different than this example.



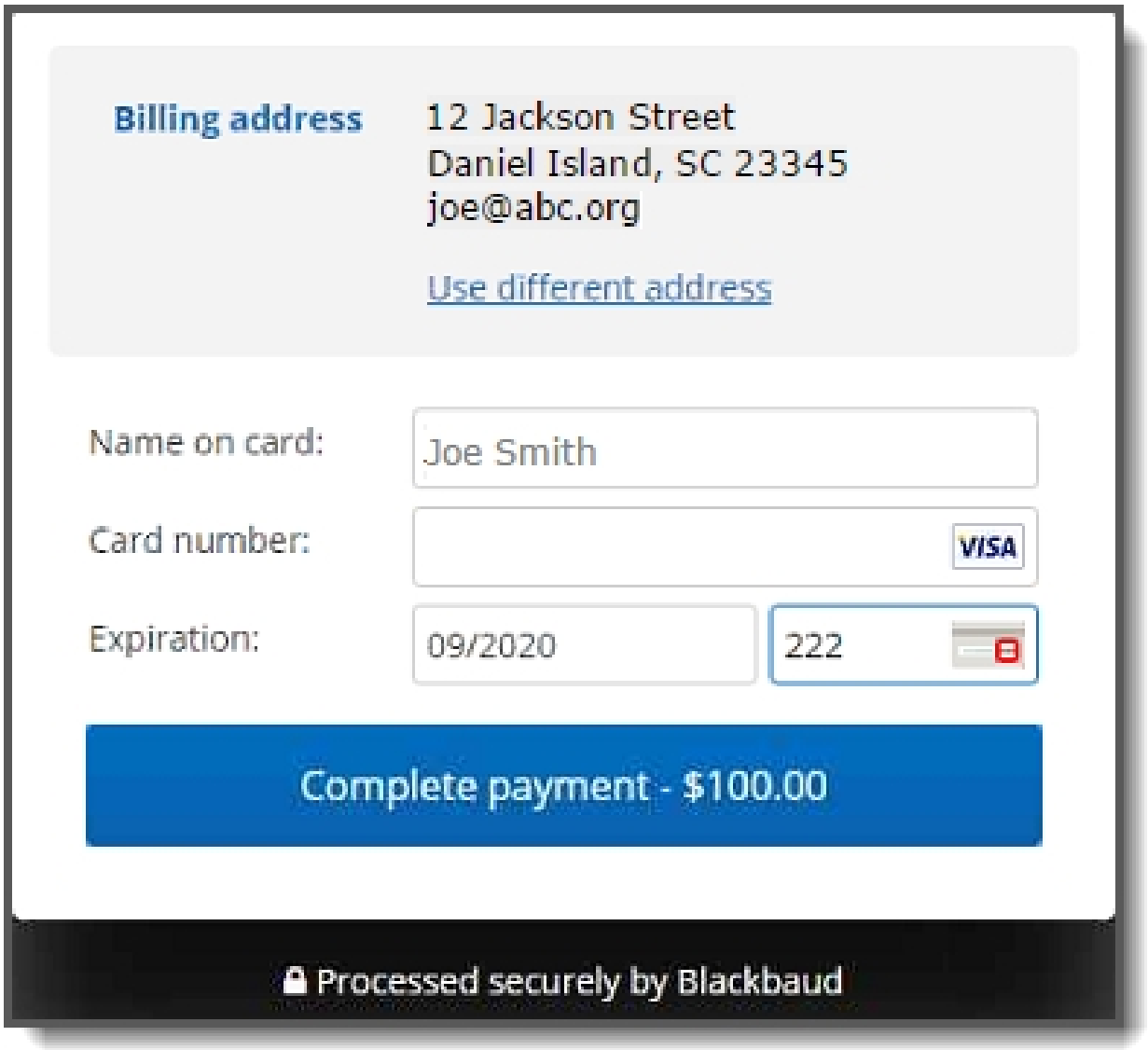

Donors can select their donation amount or enter a different amount in **Other**, then click **Donate Now**. They can then enter their billing address information in the checkout window.

***Note:*** Donors using a digital wallet, such as Apple Pay, do not need to enter billing information.




***Warning:*** Your code tables in Blackbaud CRM for countries and their subdivisions, such as states and provinces, must follow the International Organization for Standardization's ISO 3166 standards. The secure payment page uses ISO 3166-1 for countries and ISO 3166-2 for subdivisions such as states. If your code tables do not match these standards, Blackbaud Checkout changes selections to the closest abbreviation when it processes transactions, and this can lead to incorrect address information. For example, if your countries table includes "United Kingdom," the secure payment page changes this to the United States abbreviation "US" because it is the closest abbreviation to "Un." In ISO 3166-1, the abbreviation for the United Kingdom is "GB," and your code table must match this. For information about how to edit your code tables in Blackbaud CRM for countries and their subdivisions, see the *Administration Guide*.

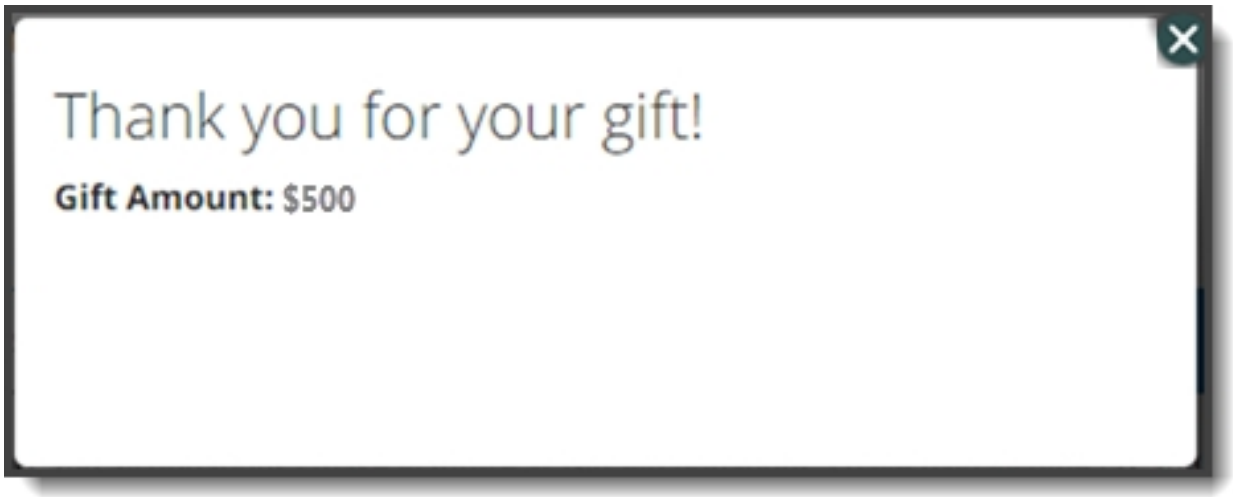
After donors click **Continue to payment**, they can enter their payment information.




The name entered in the **Name on card** field is used to match to an existing constituent record or to create a new constituent record.

***Note:*** The fields on the secure billing and payment screens display as shown and cannot be customized.

When donors click **Complete payment**, the confirmation screen displays.




## Set up Apple Pay for Blackbaud Checkout

With the Donation Form - Mini (Beta) part, you can now accept payments through Apple Pay when you use ***Blackbaud Merchant Services*** (BBMS) to process one-time credit card donations. This new payment option allows your constituents on Apple devices to make donations without having to enter as much information on the donation form, because data such as their credit card number and billing address are already stored in their Apple Pay wallet.

Apple Pay is now available to donors as a secure checkout option for BBMS customers in the U.S. Previously, this was only available for organizations in the Apple Pay Early Adopter Program (EAP); now it is Generally Available.

### To get approved to use Apple Pay

- Complete the request for information form on Blackbaud's website. A Blackbaud representative will contact you to confirm we have completed enablement of Apple Pay for use with your Blackbaud Merchant Services account.

  If you do not yet have a Blackbaud Merchant Services account, a representative can assist in setting up an account for you.

***Note:*** Please be aware that the onboarding process for setting up Apple Pay may take several weeks. In the meantime, your organization doesn't have to wait to start using the Donation Form - Mini (Beta). You can still configure the form and use it for taking donations using credit cards, Visa Checkout, and Masterpass.

Once the onboarding process is completed, Apple Pay will automatically display as an additional payment option on the checkout screen for donors who are using an Apple Pay-enabled environment. All transactions are processed via BBMS.

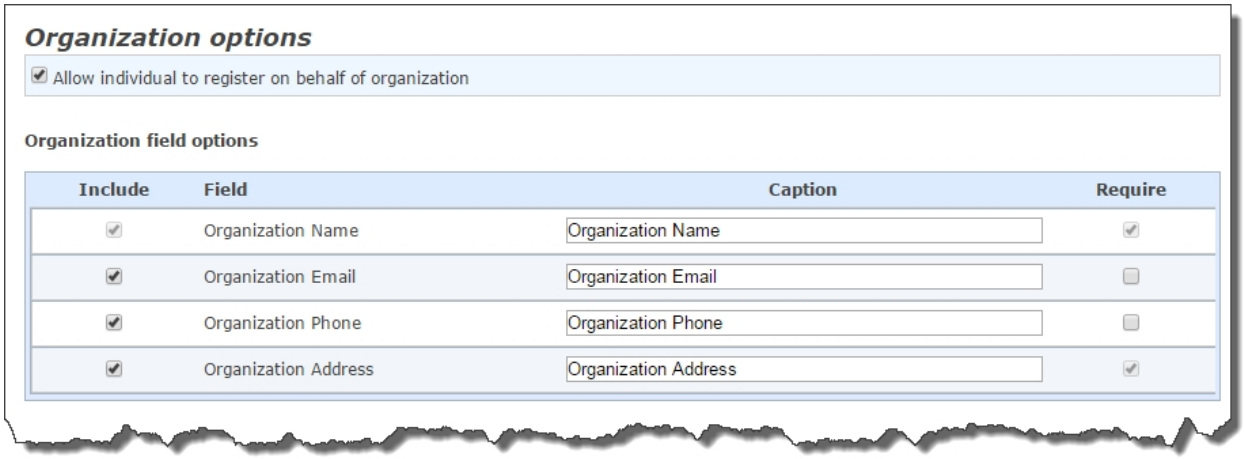
***Note:*** Ensure you select your BBMS merchant account in the **Merchant account** field on the Donation Form - Mini (Beta) part.

***Note:*** Refer to Apple's Terms and Conditions in the Blackbaud Checkout FAQs.

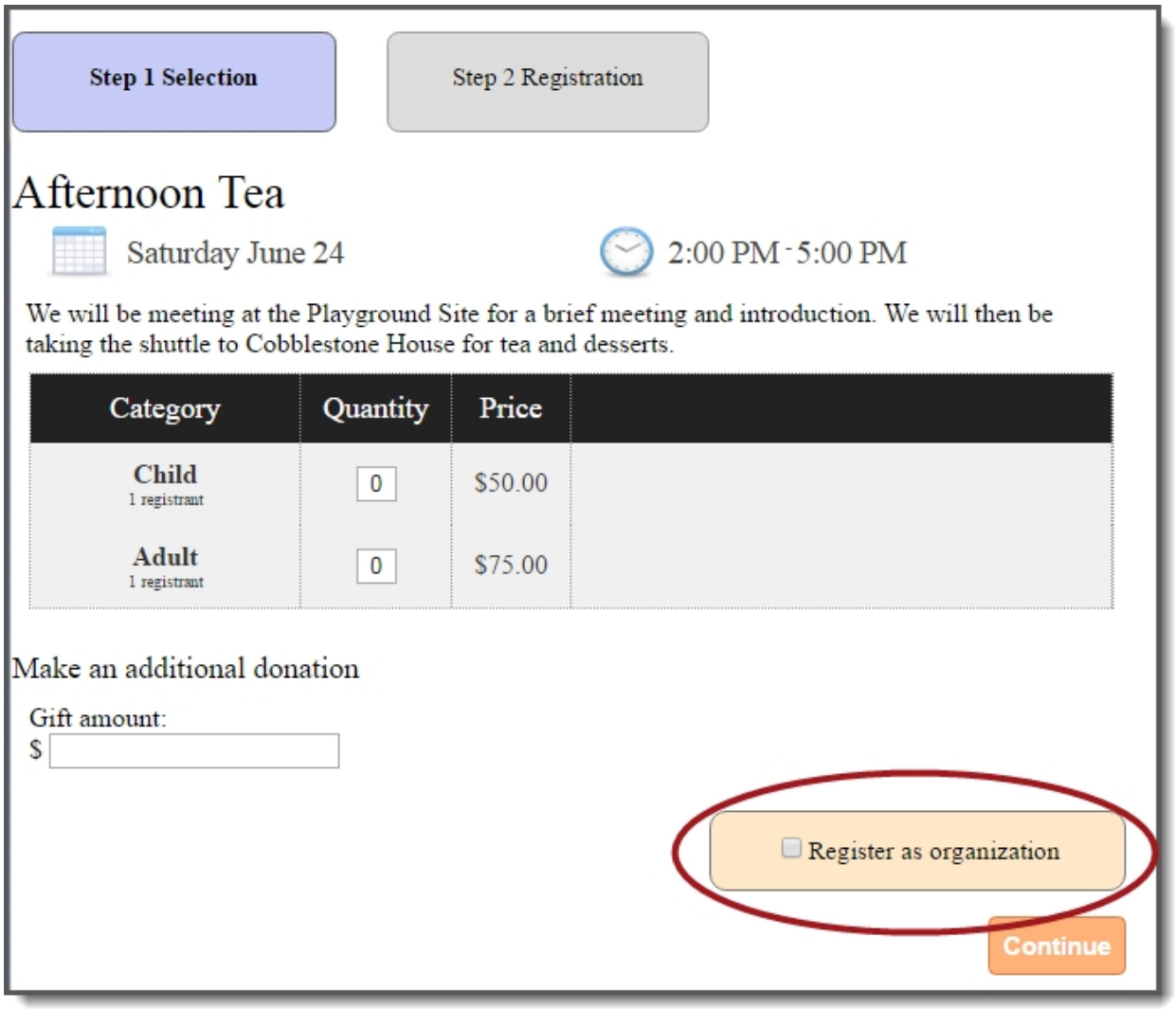
# Event Registration Form: Register as an Organization

We've added new functionality to the Event Registration Form that allows website users to register as an organization so they can make multiple ticket purchases for the same event. The organization can indicate who is attending the event or purchase tickets for unknown guests. In Blackbaud CRM, the payment for the event is tied to the organization.

You can configure the Event Registration form to enable this feature. On the **Design** tab, click **Options**. Under **Organization options**, select **Allow individual to register on behalf of organization**, then select the fields to appear on the registration page. As with the individual biographical fields, you can alter field captions and select which fields are required. The **Organization Name** field is always displayed by default and is required.



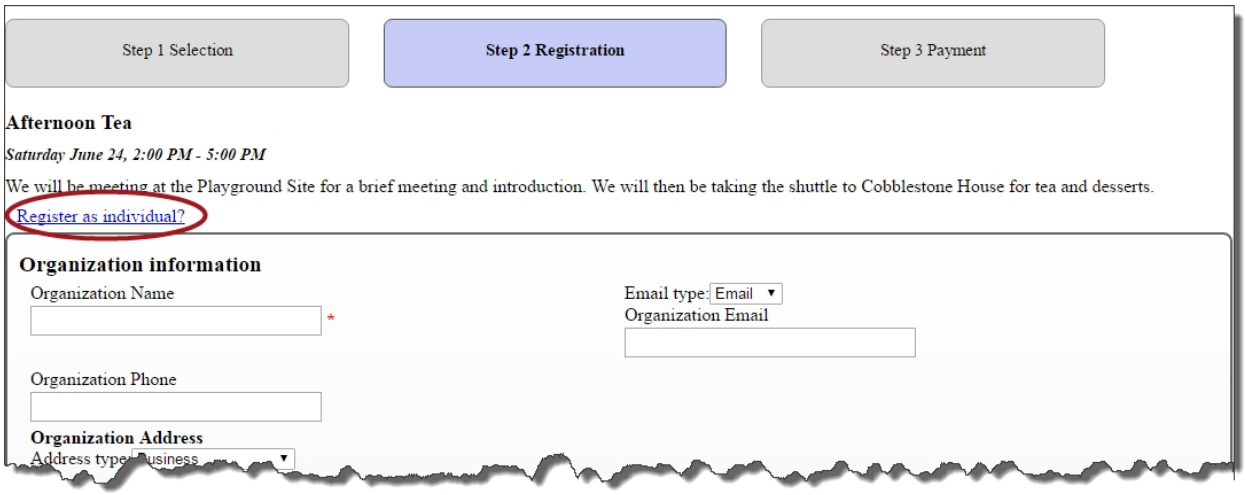

On the Step 1 Selection page of the Event Registration Form, after website users select the events they want to attend, they can optionally select to register as an organization.




When users select **Register as organization**, the Step 2 Registration page displays with the **Organization information** fields that were configured on the Event Registration Form part.

If users forget to register as an organization on the Step 1 Selection page, they can click **Register as an organization?** at the top of the Step 2 Registration page and the applicable organization registration fields appear on the page.

Users can click **Register as individual?** if they did not intend to register as an organization on the Step 1 Selection page.




In the corresponding batch in Blackbaud CRM, two new columns are included for the organization: **Organization name** and **Linked organization auto-match**. In Web Transactions > Configure Integration, on the **Auto-match** tab, you can specify matching criteria for the batch to auto-match and update the **Linked organization auto-match** column. After you commit the batch, the **Registrations** tab on the Event record displays the organization record.

# Batch Separation for Event Registrations

We've added the ability for you to split incoming event registration information from your Blackbaud Internet Solutions website into separate batches in Blackbaud CRM. Constituent updates and additional revenue information can be split into different batches that are separate from the event registration transaction batch. This enables an event administrator to manage the event information in a timely manner, and have the constituent updates and additional revenue information reviewed and committed by the appropriate departments.

***Note:*** This batch separation capability is applicable to transactions made using the Event Registration Form and the Event Registration Form (Classic) parts.

To configure the separate batch assignments in Blackbaud CRM, click the **Batch Assignment Settings** tab on the Web Transactions page. Select the event registration transaction batch you want to split, then click **Edit**. On the Edit batch assignment settings screen, you can either click **Add** in **Batch options** to create a new batch assignment, or select a batch assignment and click **Edit** to update an existing batch assignment.

**Add batch assignment**

Name:

**Transaction filters**

Assign by: Constituent

Assign by selection:

**Batch owners**

Batch template: BBIS Event Registration Transaction Batch

Select owners for batch assignment:

| | Owner |
|---|---|
| * | |

☑ Separate constituent updates into different batch

Batch template: BBIS Profile Update Transaction Batch

Select owners for batch assignment:

| | Owner |
|---|---|
| * | |

☑ Separate additional revenue into different batch

Batch template: Enhanced Revenue Batch

Select owners for batch assignment:

| | Owner |
|---|---|
| * | |

On the Add/Edit batch assignment screen, you can specify one or both batch separation options. Select **Separate constituent updates into different batch** to have any constituent update coming in with an event registration for a registrant separated into a different profile update batch. Select **Separate additional revenue into different batch** to have any additional revenue coming in with an event registration separated into a different enhanced revenue batch. When you select either of these options, the **Batch template** and **Batch owners** fields display so you can specify the corresponding template type and owner for each batch. By default, a batch assignment setup is provided.

When you review the event registration batch transaction details before committing the batch, you'll notice some fields do not display. If additional revenue is found, the **Additional Donation** tab is no longer shown. If a constituent match is found or if a guest is matched to a Linked Constituent, the **Process** column checkboxes are not displayed on the **Biographical** and **Address** tabs.

When the batch is committed, biographical and address updates for registrants and linked guests are written to the separate BBIS Profile Update Transaction Batch. For additional revenue updates, registrant information (constituent name, additional donation amount, designation, appeal, and campaign) is written to the separate Enhanced Revenue Batch.

***Note:*** The batch separation only splits constituent updates into the BBIS Profile Update Transaction Batch when the incoming registrant is matched to an existing Blackbaud CRM constituent record. If the registrant does not exist in Blackbaud CRM, a new constituent record has to be created, and so the information is written by theEvent Registration Batch.

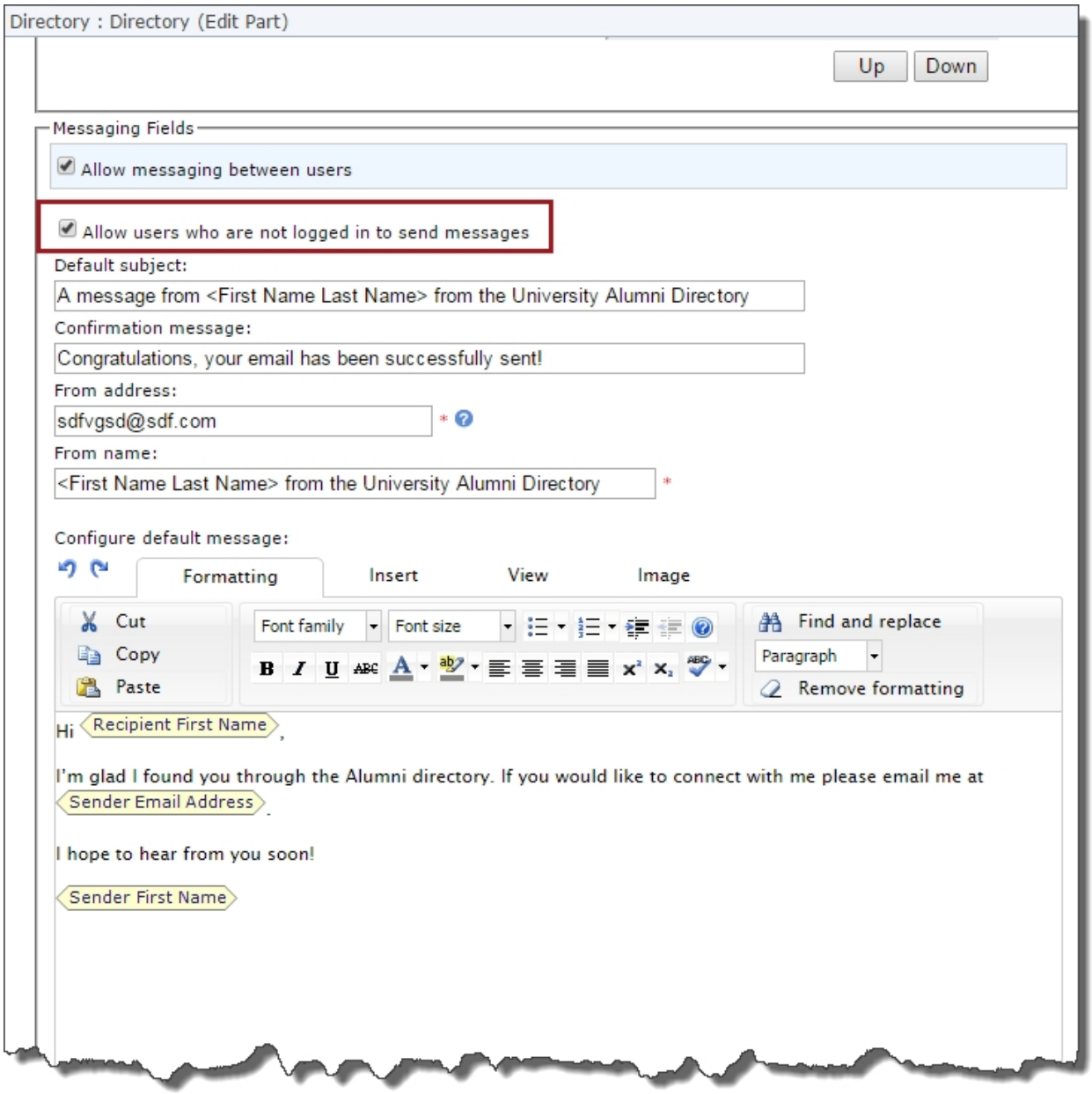
# Service Pack 13

# Directory Private Email Messaging for Anonymous Users

We've enhanced the Directory Private Email Messaging functionality so that anonymous users can send private messages. Alumni and other users now have the ability to send messages to others in the directory without having to log in to Blackbaud Internet Solutions.

Before you configure a directory part to allow anonymous users to send messages, make sure that reCAPTCHA is enabled on your site in *Administrator* > *Sites & settings*. See reCAPTCHA settings for information on configuring reCAPTCHA.

On the Design tab of a Directory part, select **Allow users who are not logged in to send messages** under Messaging Fields to enable anonymous messaging. This option is available only when **Allow messaging between users** is selected.




***Note:*** You can configure a Directory Messaging Opt-out element on the Communication Preferences form to enable users to opt-out of directory messaging.

When messaging is enabled, the **Send a message** icon displays in the directory's Messaging column for people who have a valid email address in Blackbaud CRM and have not opted out of messaging. Anonymous users can click the icon to display the default email message, which can be edited as desired. The **Default subject**, **First Name**, **Last Name**, and **From email address** fields are required. The **From email address** is the default **Reply to** address when the recipient replies to the message.

***Note:*** An anonymous user can send a maximum of 10 messages per hour. When this limit is reached, a message displays telling them to try again later.

When the user clicks **Send message**, the email is sent via the organization to the recipient, and the recipient's email address is not visible to the sender. A confirmation message displays when the email is successfully sent.

# Upgraded HTML Editor in Email Messages and Templates

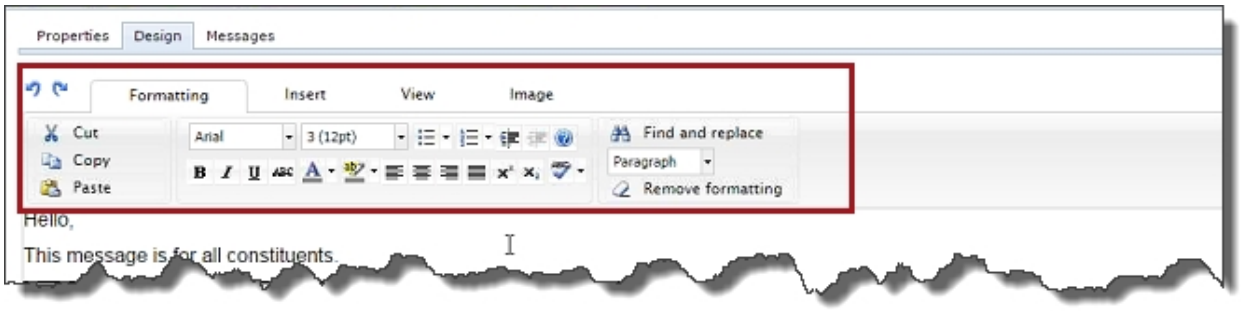
Blackbaud Internet Solutions provides a powerful HTML editor to allow you to format and lay out content. With the HTML editor, you can update content easily and safely while you maintain control over the design and content. In this release, we've upgraded the HTML editor used for creating email messages and email templates to the most recent version (TinyMCE version 4).

One of the most important benefits of this upgrade is that the editor now includes the HTML <head> tag that's necessary for creating responsive design. With responsive design, your emails display optimally on any device — desktop, tablet, or smartphone.

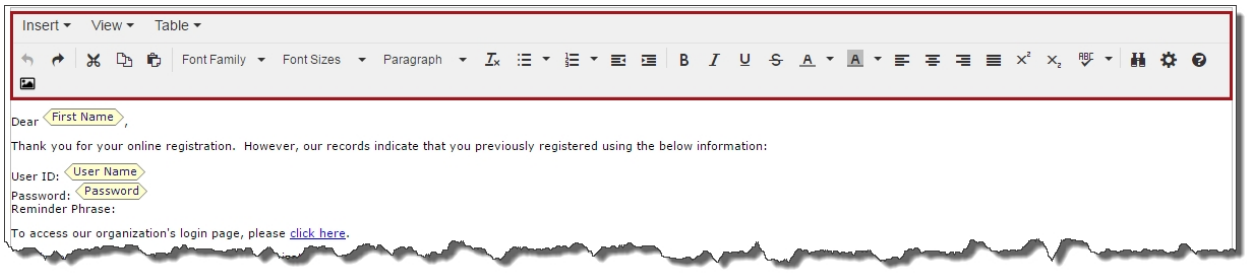
The previous version of our HTML editor removed the <head> tag from the source code, which prevented you from creating emails with a responsive design. This new version of the HTML editor automatically adds the <head> tag in the HTML source code, where you can include elements such as scripts, styles, and meta information.

***Note:*** For this release, we've updated the HTML editor *only* for email templates and email messages. Upgrades to the HTML editor used in other parts of Blackbaud Internet Solutions are planned to be phased in as part of our upcoming releases.

Another difference between the upgraded HTML editor and the previous version is how the functionality is organized. In the previous version, there were separate tabs — **Formatting**, **Insert**, **View**, and **Image** — as shown below. There was also a **Table** tab that displayed when a table was selected in the editor.



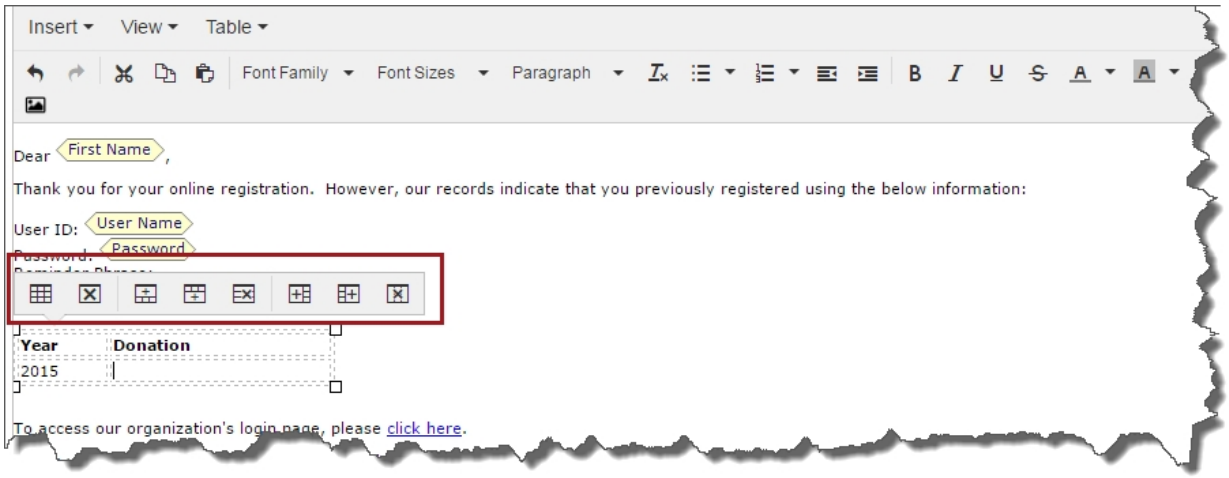

In the upgraded version, the HTML editor functionality is now organized into three drop-down menus — **Insert**, **View**, and **Table** — and a toolbar.



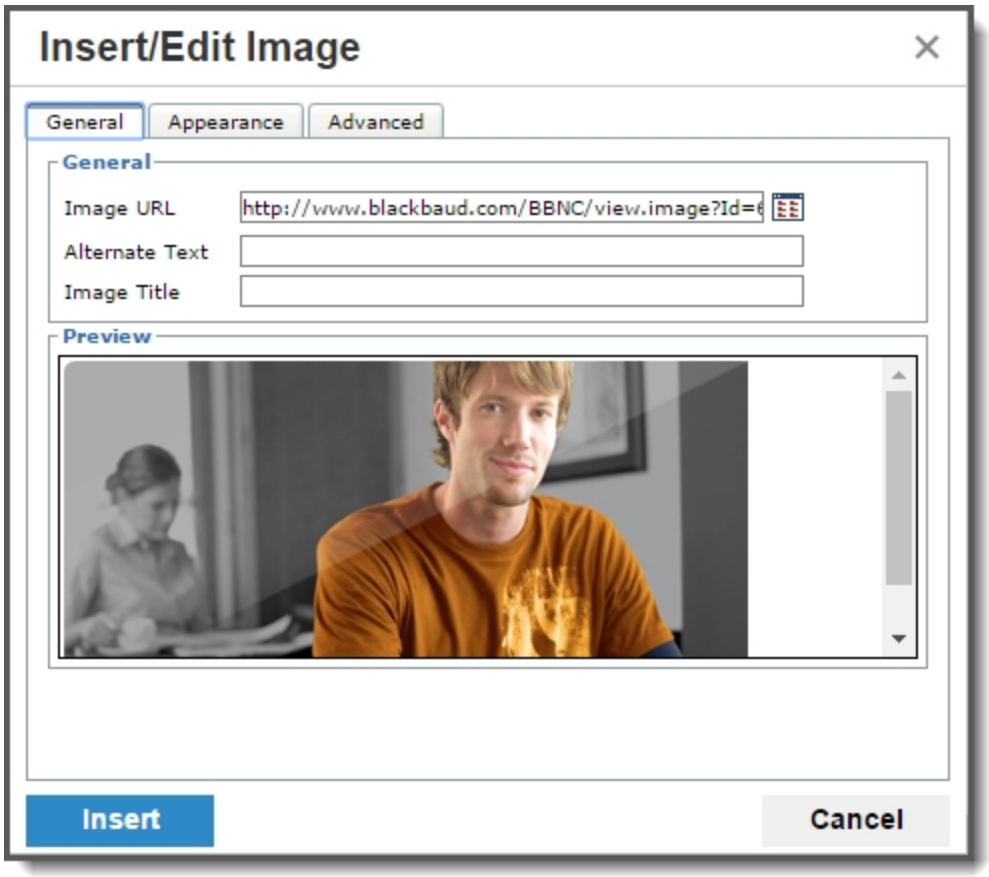

The toolbar includes all the same functionality that was previously located on the **Formatting** tab. You can hover over each toolbar icon to see its description.

The **Insert**, **View**, and **Table** menus include the functionality that was previously located on the **Insert**, **View**, and **Table** tabs. Note that the **Table** menu items are not enabled unless you have a table selected in the HTML editor.

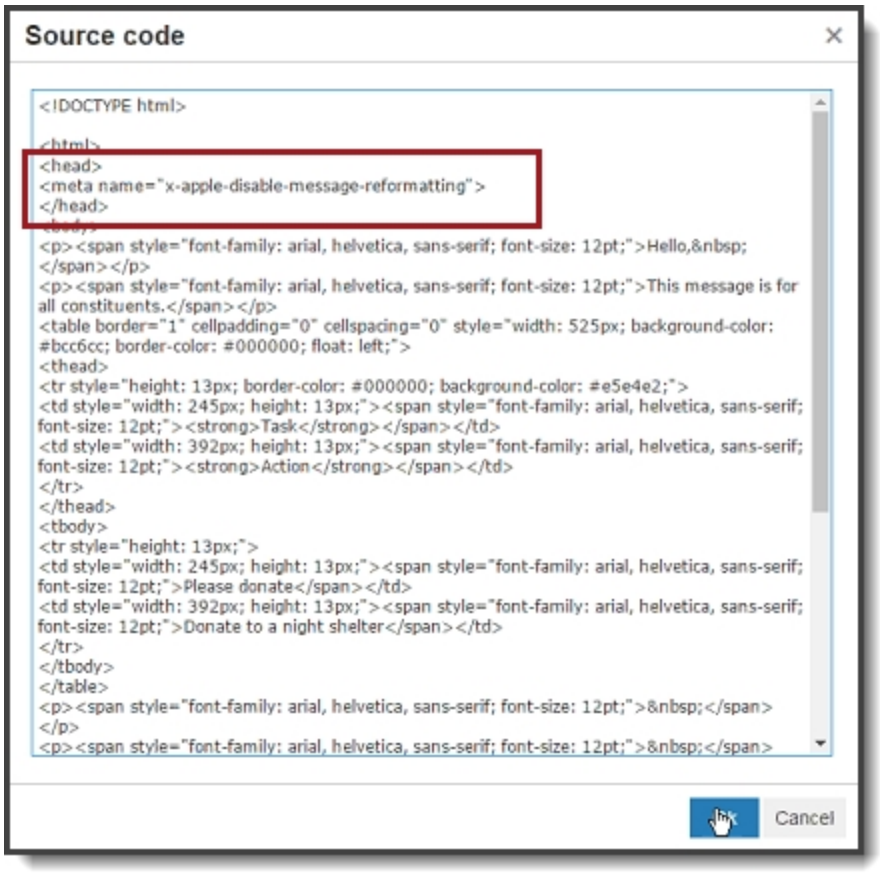
When you click anywhere in a table, a toolbar with commonly used table operations — **Table properties**, **Delete table**, **Insert row before**, **Insert row after**, **Delete row**, **Insert column before**, **Insert column after**, and **Delete column** — displays in the HTML editor adjacent to the table. These table operations, along with additional ones, are also included in the **Table** menu.



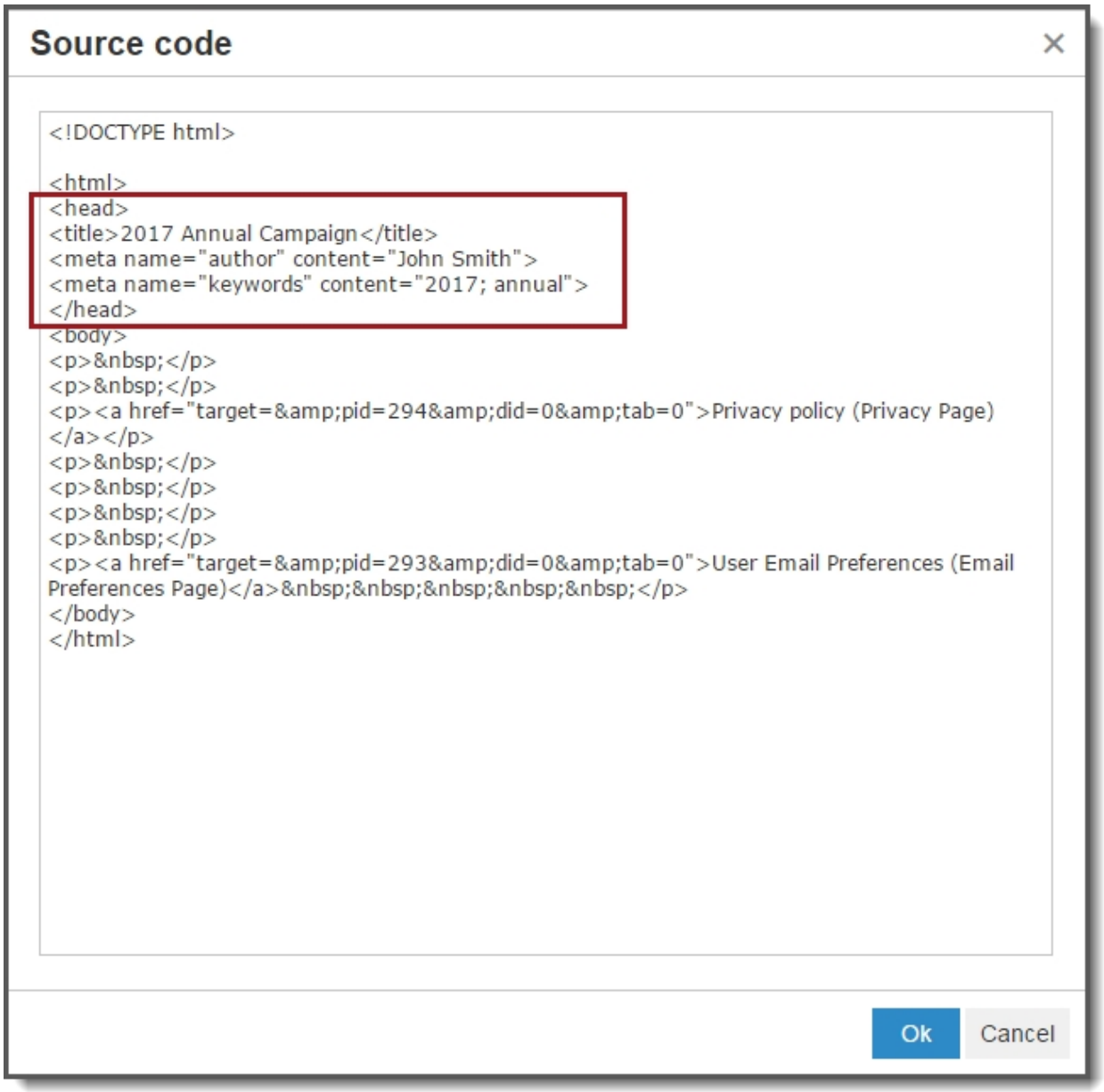

Functionality previously located on the **Image** tab is now accessed from the toolbar. Click **Insert/Edit image** to display the Insert/Edit Image window. Here you can select an image to add to your email message or template, and modify the image's appearance and properties.




You can include scripts, styles, and meta tags in your email message or template using the <head> tag. On the View menu, click **Source code**, add your own code as needed in the <head> tag, then click **Ok** to save.




You can also specify document properties — **Title**, **Keywords**, **Description**, **Robots**, and **Author** — that will be included in the <head> tag as meta data. Click ⚙ on the toolbar to display the Document Properties window. The data you enter in the document property fields is saved as meta data inside the <head> tag.




While the document property fields may not be as important to email messages and email templates, they'll have more significance once the HTML editor is upgraded for other Blackbaud Internet Solutions parts, such as the Formatted Text and Images part, the Donation Acknowledgment part, and the Event Acknowledgment part.

# Sample Responsive Email Templates

To maintain consistency with industry standards for fully responsive emails, we're providing three generic responsive email templates that you can download from the Blackbaud Community. After

downloading these templates, you can use them in Blackbaud Internet Solutions as default templates from which you can create your own responsive emails for acknowledgments, appeals, and newsletters.

For detailed information about these templates, including how to download and use them in Blackbaud Internet Solutions, see the Responsive Email in BBIS blog post in Blackbaud Community.

# Support for SVG Image Files

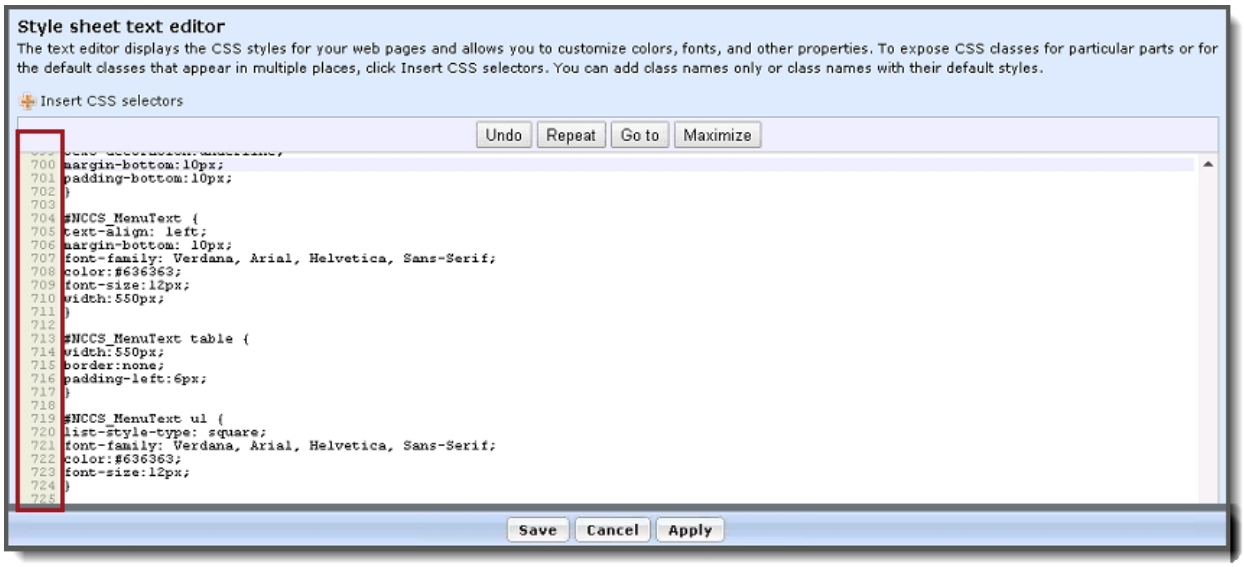
Blackbaud Internet Solutions now supports the Scalable Vector Graphics (SVG) image file format. The SVG format enables your images to display optimally when used in responsive web design, because they retain their quality when they're resized. You can upload SVG images into the Image library and the File library from *Site explorer*. After you upload the images, you can use them on your Blackbaud Internet Solutions website.

SVG is a vector-based image format used for two-dimensional graphics included in websites. SVG images and their behaviors (such as scalability) are defined in XML. To view or edit the image attributes, open the SVG file in any text editor (such as Notepad); the image definition is located within the <svg> tag. Refer to your preferred XML markup reference material for more detailed information about editing the SVG image attributes.

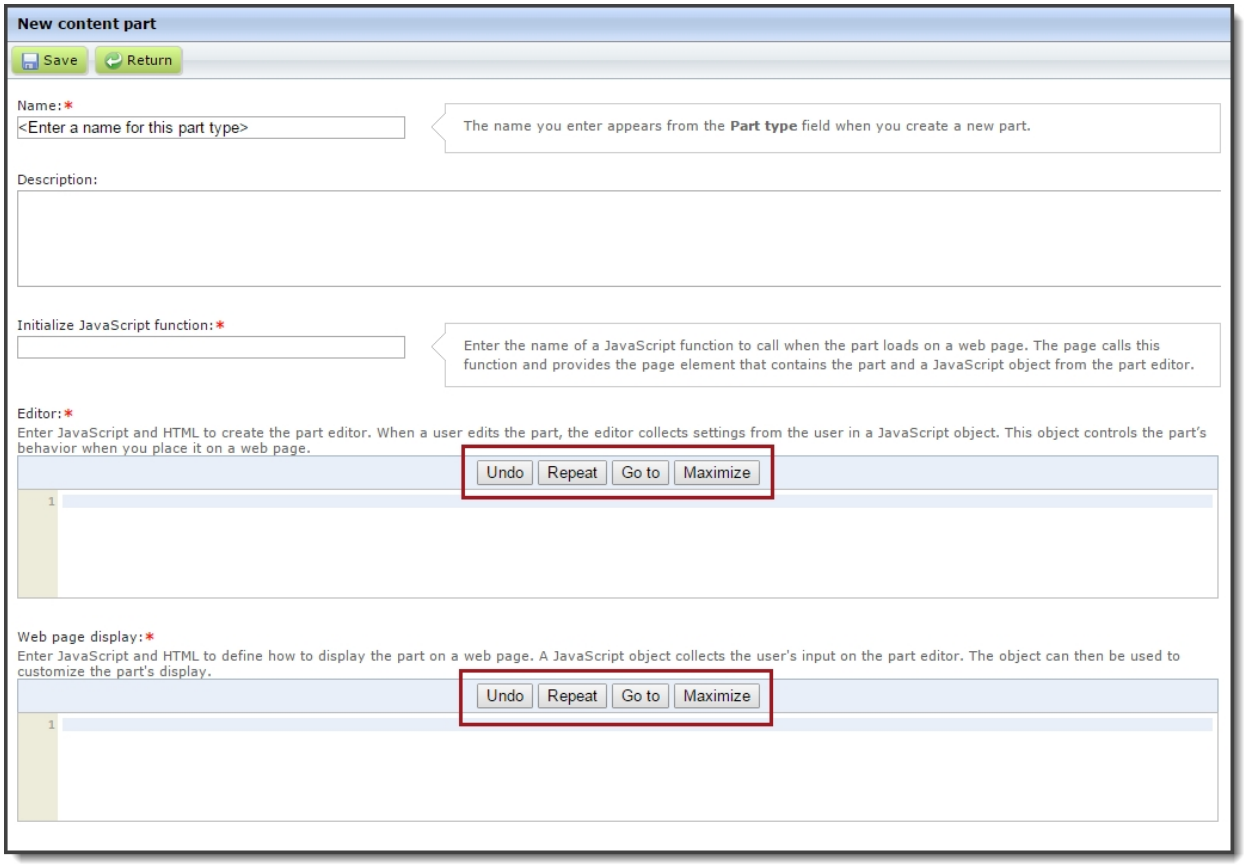
# Usability Enhancements for Developer Parts

We've enhanced the code entry sections of several parts — Style Sheets, Unformatted Text, and Custom Content — to make the development process easier. We've improved the code editor functionality so it's easier to create and edit code directly in these Blackbaud Internet Solutions parts. Previously, many users had to write and troubleshoot the code in a different application, and then copy the code back into the Blackbaud Internet Solutions parts, which made the process time-consuming.

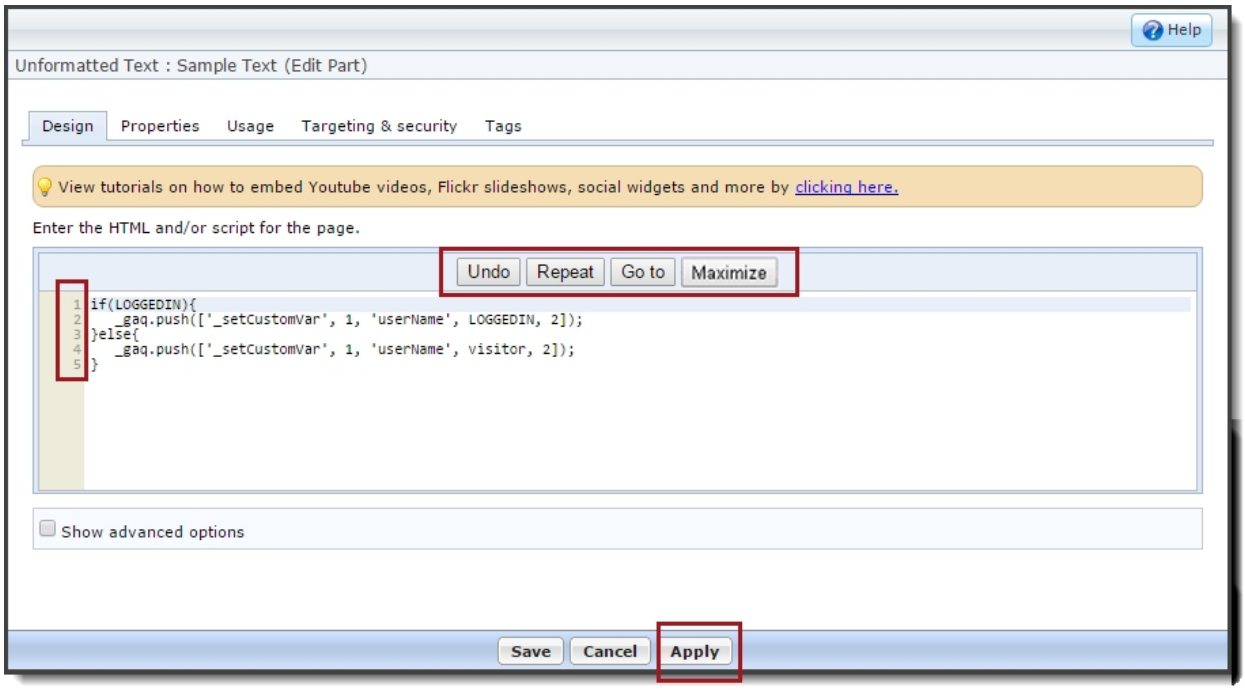
One of the enhancements we made was to add line numbers to the code entry display. This enables you to locate code more easily.




We also included four new buttons — **Undo**, **Repeat**, **Go to**, and **Maximize** — to enable you to perform common editing actions.




In addition, we added an **Apply** button on the Unformatted Text editor. This enables you to save your work and continue editing without having to close the part and reopen it.




# eStore Functionality: Notice of Deprecation

Blackbaud will no longer sell the eStore part of Blackbaud Internet Solutions to new clients. While eStore will continue to be available to Blackbaud Internet Solutions clients that already own eStore, starting in Q1 of 2018, Blackbaud will no longer develop eStore beyond critical security maintenance. Clients that are interested in exploring alternative solutions to address their eStore needs should contact their account executives for more information.

# Service Pack 14

# Redesigned Event Registration Form for Complex Events

This service pack includes a redesigned Event Registration Form part that supports complex events — such as multi-day events or when there are multiple events on the registration form. The Event Registration form has a new user interface and a streamlined workflow to make the registration process easier especially when registering multiple attendees for multiple events.

***Note:*** One major workflow change is that the attendee registration page displays before the list of events is shown. It is assumed that users will have already seen the list of events before they access the Event Registration Form. When creating an event, our recommendation is that you link users to the registration form at the point that you want users to start their registration.

## Event Registration Form: Website

Attendees | Select events | Select options | Review | Checkout

The timer shows how long you have to complete this page before we release your reservation. 9m, 19s

# Upcoming Fundraising Events

### Wednesday, September 20, 2017

| Attending | Start time | End time | Event name | Ticket price | Subtotal |
|---|---|---|---|---|---|
| **3 attending** Edit \| Remove | 6:00 PM | 11:00 PM | Bingo Night | £1 - £20 | £41 |

### Thursday, September 21, 2017

| Attending | Start time | End time | Event name | Ticket price | Subtotal |
|---|---|---|---|---|---|
| Attend | 11:00 AM | | Harvest Festival | £2 | £0 |
| **2 attending** Edit \| Remove | 8:00 PM | 11:00 PM | Black Tie Gala Dinner | £10 | £20 |

### Tuesday, October 10, 2017

| Attending | Start time | End time | Event name | Ticket price | Subtotal |
|---|---|---|---|---|---|
| Attend | 11:30 AM | Thu. 10/12 | Camp Carnival | £10 | £0 |

**Total due: £61**

Previous | Continue

When you include the Event Registration Form part on your website, users can now register multiple attendees for multiple events using the streamlined workflow steps:

**Step 1: Attendees** — Website users can enter details for all registrants, including themselves, multiple guests, and unnamed guests, who will be attending any of the events. When configuring the form, you can specify which fields to display — and which fields are required — on the Attendees page.

**Step 2: Select events** — Shows a list of all events that are available to register for. When selecting an event to attend, website users can select attendees from a drop-down list populated with all attendees that were added in Step 1. As attendees are registered for events, the page is automatically updated with event attendee information and subtotal amounts.

**Step 3: Select options** — Website users can choose options (where applicable) for events, such as preferences and restrictions, for each registrant for each event. Note that event options cannot be selected for unnamed guests.

***Note:*** The **Select options** page doesn't display if there are no options available for the selected events.

**Step 4: Review** — Displays details for the selected events, such as who is registered for each event and what their preferences are. Modifications can be made to any event registration by selecting the event's link. When designing the form, you can configure whether this page displays to the website user.

**Step 5: Checkout** — Website users can specify the billing information, additional donations, and the payment method, then make a payment using Blackbaud Checkout.

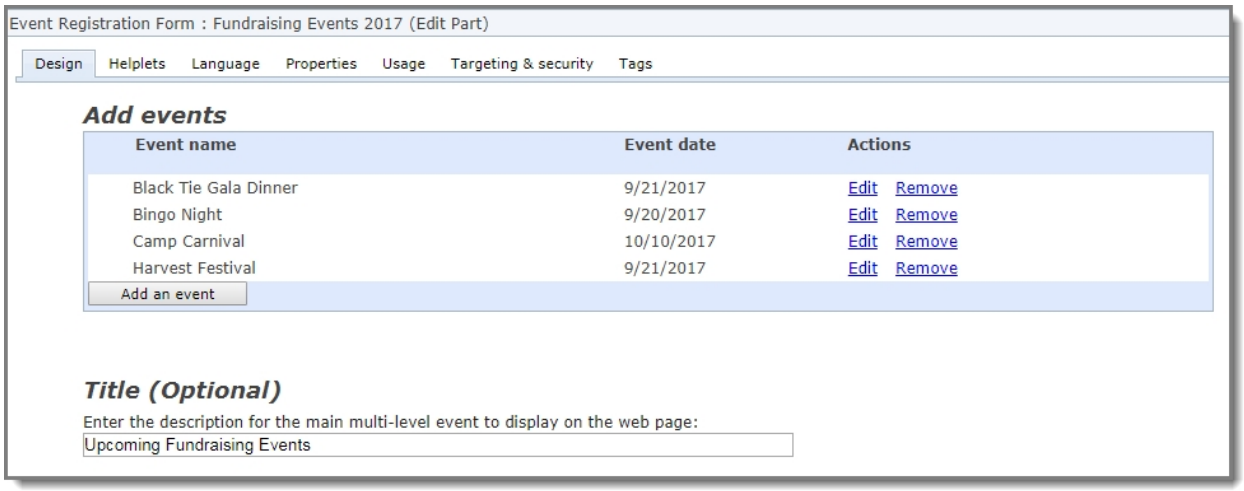
Once the registration is complete, the transaction data in Blackbaud CRM includes information for each registrant, including event details and options, and payment information.

## Event Registration Form: Edit Part

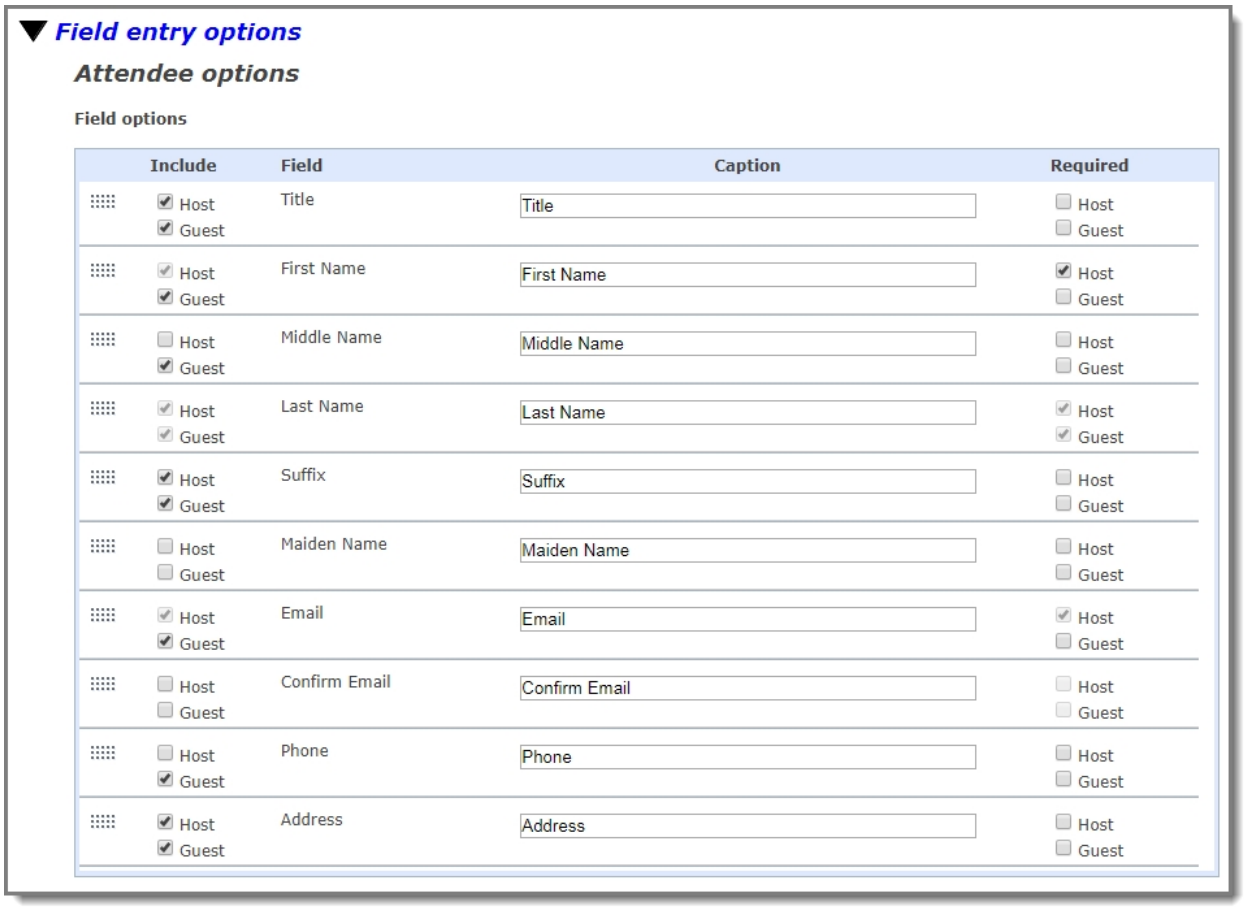
***Note:*** We've used new CSS classes to support the user interface redesign. If your organization currently uses a custom CSS on your event registration forms, you should plan for additional design work in order to incorporate our new form design into your existing site style.

When you design the new Event Registration Form part, you select multiple events to include on a single form. Select **Add an event** to choose an event from Blackbaud CRM and specify the event's configuration options. All events listed under **Add events** display on the **Select events** page of the Event Registration Form in chronological order. The events are automatically ordered on the form based on their start date and time, so you no longer have the ability to manually reorder events.

Under **Actions**, you can edit or remove events as needed. Optionally, you can also enter text in **Title** if you want to include an event description on the form for the main multi-level event.




The registrant biographical fields that display on the **Attendees** page are now configured using the new **Field entry options** section under **Attendee options**. In the **Include** and **Required** columns, select which fields to display and which fields are required for hosts (primary registrants) and their guests. You can also modify the text that displays in the **Caption** field and change the order that the fields will display on the form. Under **Organization options**, you can select whether to allow users to register as an organization; if selected, the option displays on the Billing Information page prior to payment.



Under **Options**, a new **Include review step** option enables you to configure whether the review page is displayed to website users during the registration process.

To provide more summary information to users after they've registered for events, we've added a new Event merge field called **Full Event Details** that you can use when customizing the acknowledgment page. When you include this merge field, all the information from the registration form's Review page displays on the acknowledgment page when registration is completed.

Thank you for registering!

The following information was recorded for your registration:

| Event | Attendee | Event Options | Event Price |
|---|---|---|---|
| Bingo Night<br>Wednesday, September 20, 2017<br>6:00 PM - 11:00 PM | arya stark | Yes Food, Medium T-Shirt Size | $1.00 |
| | sansa stark | Yes Food, Medium T-Shirt Size | $1.00 |
| | Unnamed | N/A | $1.00 |
| Black Tie Gala Dinner<br>Thursday, September 21, 2017<br>8:00 PM - 11:00 PM | arya stark | Vegan Food Preference | $20.00 |

Total Amount: $38.50
Payment Method: Visa Credit Card (1881)

Date: 9/14/2017

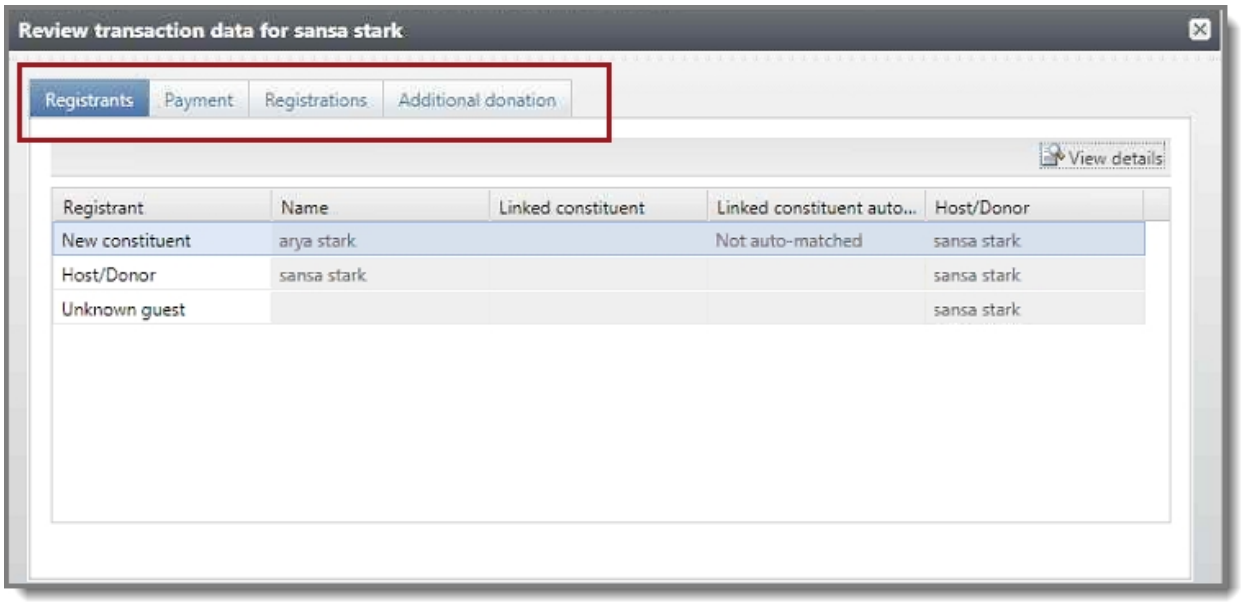
We would also like to thank you for your additional donation of $15.50.

On behalf of our entire organization, thank you again for registering, and we look forward to seeing you at the event!

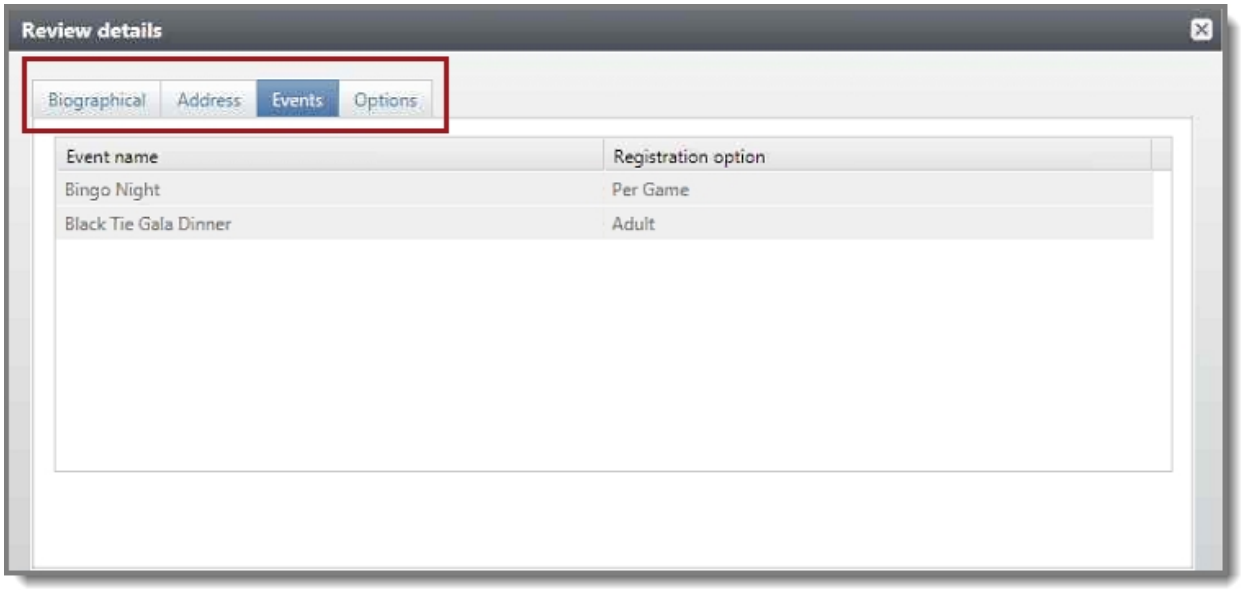
# Event Registration Batch Processing User Interface Enhancements

To support our redesigned Event Registration Form part, we've also redesigned the batch processing to better accommodate multiple event registration results. Now, when you review the downloaded event registration batch details in Blackbaud CRM, the information for registrants and events is organized more efficiently.

We removed the **Guest** tab, and now all registered attendees — host, guests, and unnamed guests — display on the **Registrants** tab. The **Registrations** tab shows details for all events that have been registered for. The **Payment** tab shows all payment information that was entered on the payment page during registration. The donation amount and designation are shown on the **Additional donation** tab if an additional donation was made during the checkout process.




When you select an attendee on the **Registrants** tab and then select **View details**, all corresponding event information is displayed. The **Events** tab lists all the events that the attendee was registered for, the **Options** tab shows the preferences selected for each event for the attendee, and the **Biographical** and **Address** tabs show the registrant's personal information.



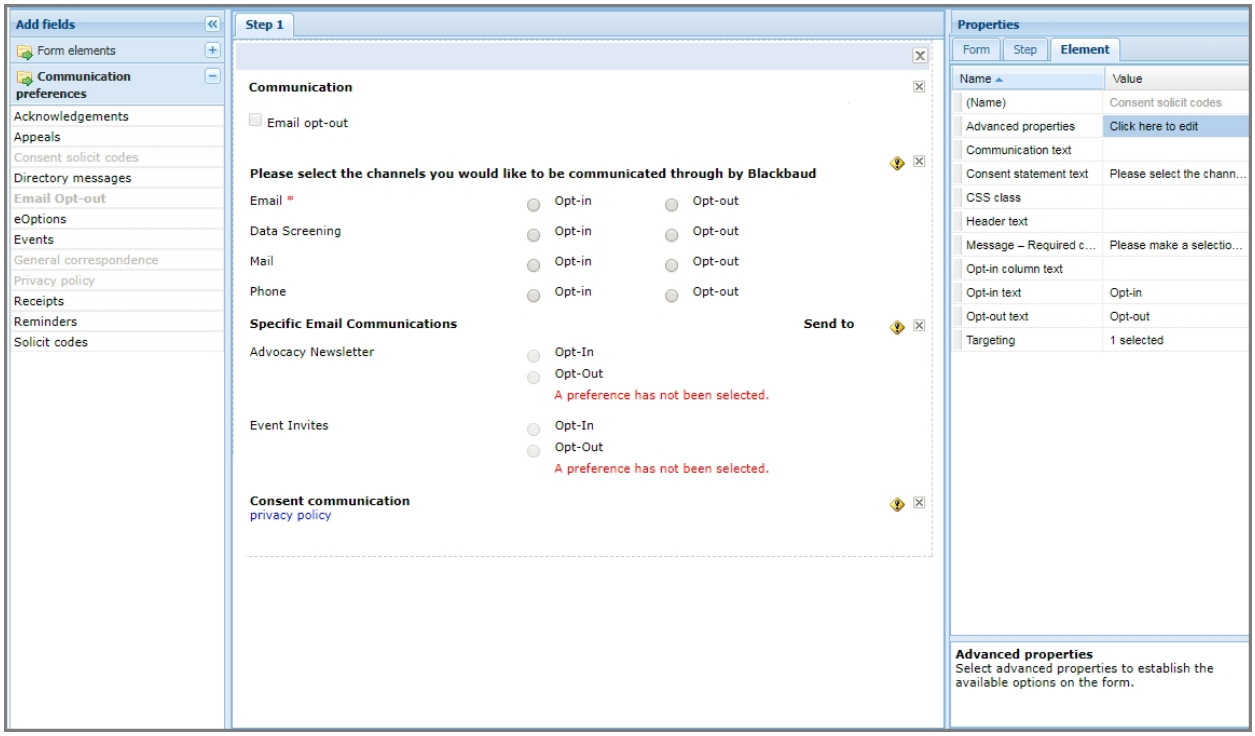

# Enhanced Communication Consent Support

The General Data Protection Regulation (GDPR) is an EU law that will be enforceable from 25th May 2018, and in the UK will replace the aging Data Protection Act. It is designed to both strengthen and harmonize data protection across EU member states, and is directly applicable to all organizations 'established' in the EU, irrespective of whether the actual data processing takes place in the EU or not.

Even if not established in an EU country, certain organizations with substantial activities in the EU will need to comply with GDPR. Please refer to our infographic Could You Be Subject to GDPR? for further guidance on whether or not GDPR may apply to your organization. Such organizations that are subject to GDPR and collect, store or process personal data must comply with GDPR's Data Protection Principles and other conditions of processing. New obligations on data controllers include expanded data subject rights, mandatory data breach notification, an enhanced focus on accountability and the appointment of Data Protection Officers. Personal data must still be processed fairly and lawfully, justified by one of six legal bases that have remained substantially similar between the Data Protection Act and GDPR, including with the data subject's consent. Arguably the most significant change, however, is the requirement that a data subject's consent to process their data must now be 'unambiguous' and given via a 'clear, affirmative action'. The penalties are also set to change, standing at a maximum of €20,000,000 or 4% of global revenue; whichever is higher. For a more in depth discussion of GDPR's operational effects, please read Blackbaud's datasheet Important Impacts of GDPR. Undoubtedly, therefore, GDPR requires organizations processing personal data to implement significant operational reform. Blackbaud has designed the following solution functionality to assist our customers in achieving this reform.

In order to support the upcoming enactment of GDPR, functionality was added in this release to ensure organizations capture explicit consent from their constituents before communicating with those constituents by any channel, such as mail, email, or phone.

To support GDPR, a new consent solicit code type was added in Blackbaud CRM. When a constituent's consent is received, preference information and related details for the consent solicit codes are included on the constituent's record on the Communication > Preferences tab. In Blackbaud Internet Solutions, several changes were made to the Communication Preferences form to support the new consent solicit codes.



## Email Opt-out

In this release, we've renamed the previous the **Global opt-out** option to **Email opt-out** to more accurately reflect the functionality and meet global email opt-out regulations for those customers who continue to use solicit codes.

## Consent Solicit Codes

The new **Consent solicit codes** element lists consent solicit code options, enabling constituents to explicitly opt-in or opt-out of a specific communication channel. You can configure which consent solicit codes to include on the form by using the Element tab in the Properties pane. Select **Advanced properties**, then specify the consent solicit codes from Blackbaud CRM you want to include on the form, the text to display for each code, and which codes require a consent selection.

## General Correspondence

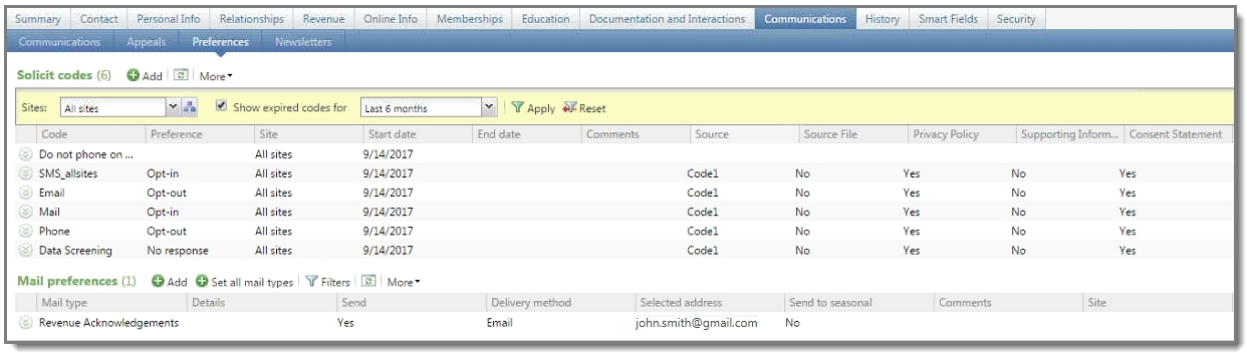
On the **General correspondence** element, the **No preference** option has been removed. Previously, constituents who did not have a previously set choice in Blackbaud CRM had their email preference options set to **No preference** by default. Now, if constituents do not specify a preference to opt-in or opt-out, the message "A preference has not been selected" displays on the form. To change the message, modify the text in the **No preference text** row on the Elements tab.

## Privacy Policy

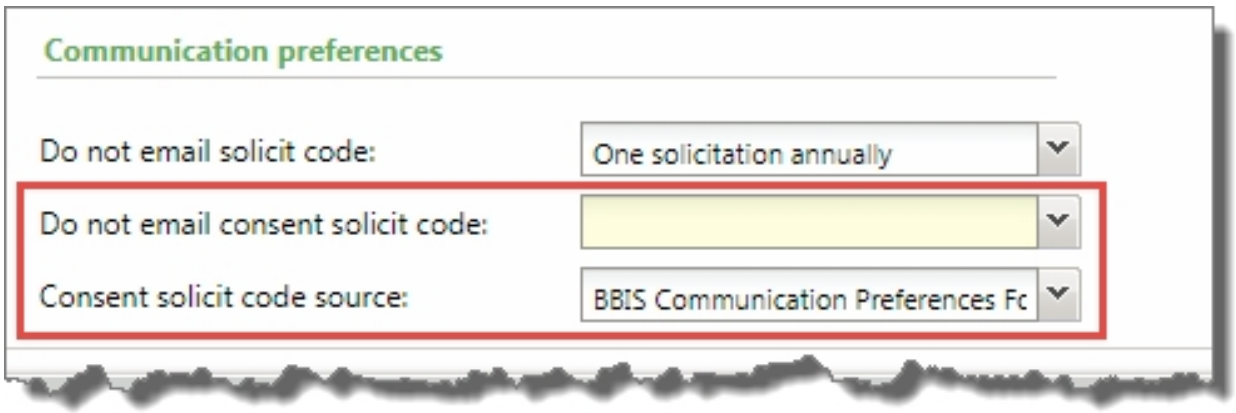
The new **Privacy policy** element enables constituents to review your organization's privacy policy from the Communication Preferences form. You can select the privacy policy to include by using the Element tab in the Properties pane. Select **Advanced properties**, then either select the Blackbaud Internet Solutions web page or enter the URL where the privacy policy is located. On the Elements tab, you can also modify the text in the **Header text** row to change the header caption, and in the **Privacy policy text** row to change the link display text.

## Blackbaud CRM Integration

When constituents submit their consent preferences via the Communication Preferences form, those preferences are written to their Blackbaud CRM constituent record and display on the **Communications** > **Preferences** tab under **Solicit codes**. Consent solicit codes, consent statement, privacy policy, and more consent details are included on the record.




Two new settings — **Do not email consent solicit code** and **Consent solicit code source**— were added in Blackbaud CRM under **Manage web transactions**, **Configure integration**. You'll need to configure these settings before you can start capturing the consent solicit codes on the Communication Preferences form.

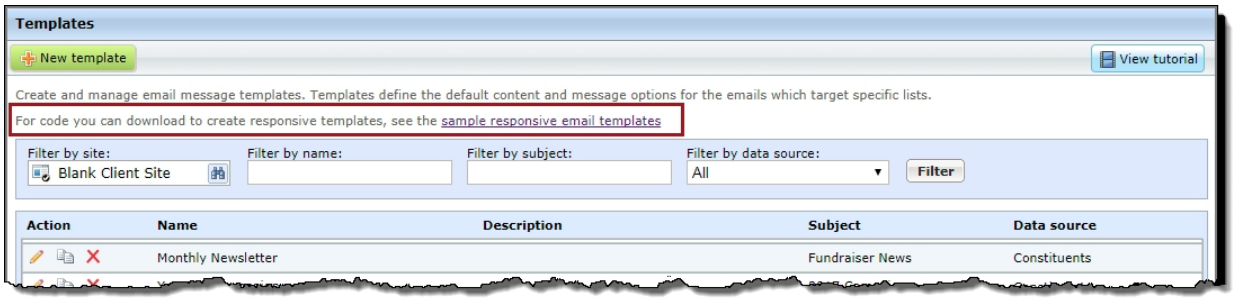



Similar to the **Do not email solicit code** setting, the new **Do not email consent solicit code**configuration setting allows you to identify one of your consent solicit codes to use as your global email opt-out value. A global email opt-out value is required by Blackbaud to comply with international email compliance, including CAN-SPAM, CASL, and GDPR.

The **Consent solicit code source** setting is written to the solicit code record when new values are added from the Blackbaud Internet Solutions Communication Preferences form.

# Sample Responsive Email Templates

In Blackbaud Internet Solutions SP13, we provided three generic responsive email templates that you could download from the Blackbaud Community, and then use in Blackbaud Internet Solutions as default templates. For this release, we've made these email templates available on the BBIS Developer site, and included a link to them from within Email Templates.




There are currently three sample responsive email templates available for download. You can use these sample templates to create your own responsive email messages for acknowledgments, appeals, and newsletters. To use these templates, go to the BBIS developer site under **Responsive Email Templates** to download the source code and review the instructions for creating a new email template in Blackbaud Internet Solutions.

Also in this release, we've removed the outdated placeholder, mobile-friendly templates from Email Templates.

# Service Pack 15

# Communication Consent Part

To enable you to easily capture communication consent on your Blackbaud Internet Solutions forms — and to assist with General Data Protection Regulation (GDPR) compliance — we've implemented a new Communication Consent part. Your organization can use this new part to collect explicit consent from users — both in the European Union (EU) and elsewhere — for how they want to receive communication from you. In order for any non-profit organization to contact constituents residing in the EU, they must have explicit opt-in consent for any kind of communication via any channel — such as email, phone, SMS, or mail.

As an organization, you can create one Communication Consent part — or multiple versions of the part — to support the forms in Blackbaud Internet Solutions that collect constituent information and write the data to constituent records in Blackbaud CRM.

With this new functionality, you can include a Communication Consent part on any of the following forms in Blackbaud Internet Solutions:

- Donation Form
- Event Registration Form (Classic)
- Events Registration Form
- User Login Form
- Payment 2.0 Form

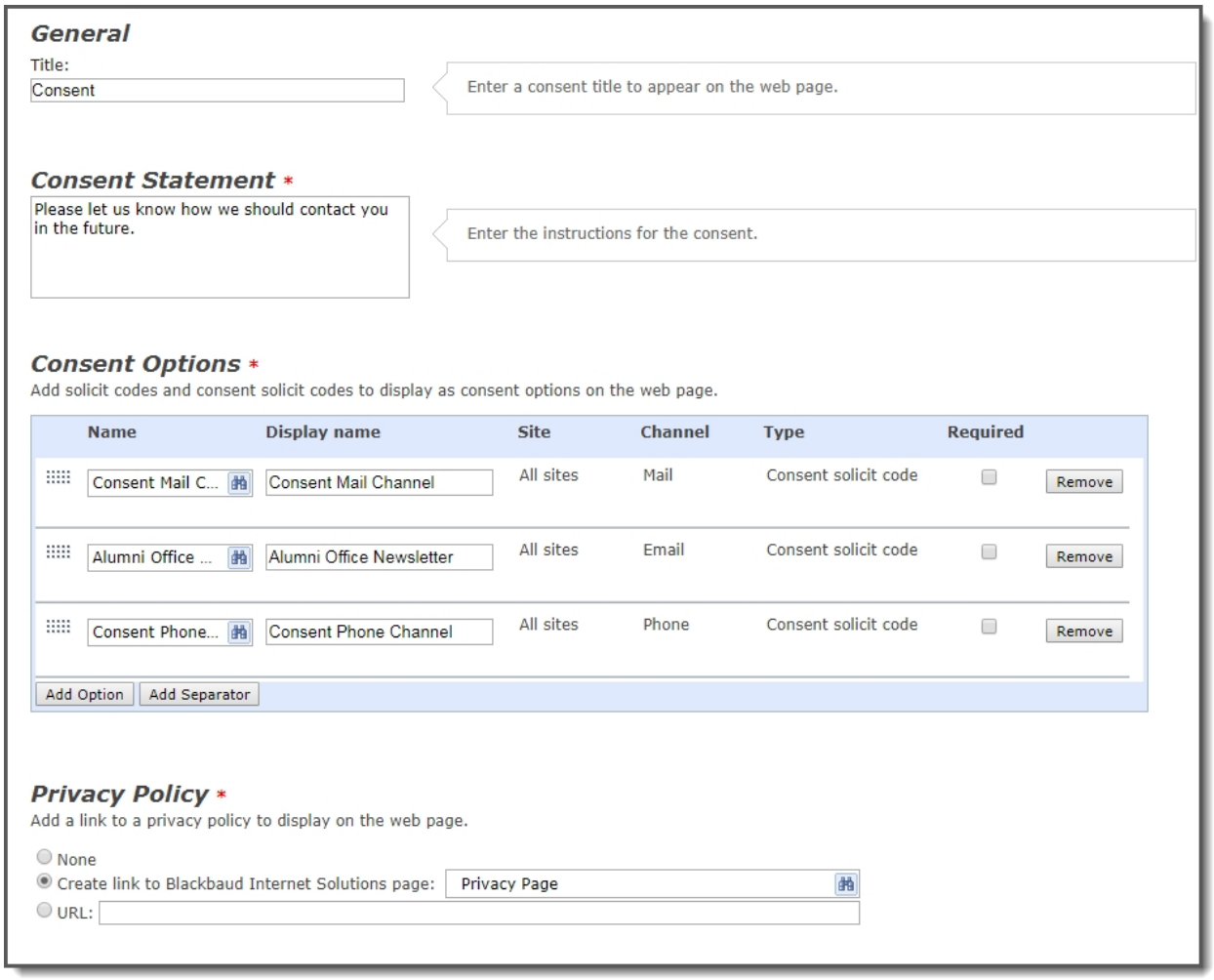
  ***Note:*** This form supports consent for all transactions types — donations, event registrations, memberships, and sponsorships.

- Advanced Donation Form

When users submit the form, their constituent record is updated on the **Communications > Preferences** tab in Blackbaud CRM with their communication consent preferences.

## Design the part

Use the **Design** tab for the Communication Consent part to configure the part and customize it for your organization.



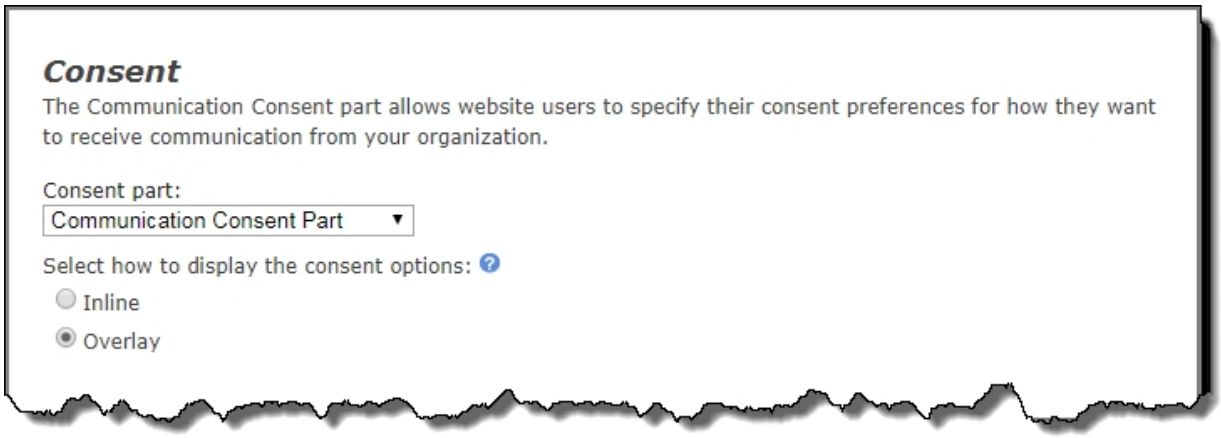

Under **General**, you can customize the title to display on the web page for the communication consent preferences or you can use the default title. You can also include customized instructions under **Consent Statement** or use the default statement.

Under **Consent Options**, add the consent options you want to display on the web page. Select **Add Option** to search for solicit codes or consent solicit codes that are configured in Blackbaud CRM, then choose the ones to include on the form. For each consent option, you can modify the caption that displays on the form, specify whether the option is required, or remove the option. Optionally, you can add a divider to separate sections on the form — for example, to keep all email consent options together — by selecting **Add Separator** and include a caption for the separator. You can click and drag the consent options to reorder them and to move the corresponding separators.

Under **Privacy Policy**, select an option for including access to your organization's privacy policy on the web page. Select **Create link to Blackbaud Internet Solutions page** to choose an existing page on your website. Select **URL** to specify the web page where the privacy policy is located. If you don't want to include a link, select **None**.

## Add the part to a form

You can add a Communication Consent part to a form by configuring the **Consent** section on the form's Design tab.




Under **Consent part**, select a saved Communication Consent part to include on the form, then specify how you want the consent options to display.

Depending on your organization's site design or how your forms are styled, you can select whether to use the inline option or the overlay option to gather consent.

The **Inline** option includes the communication consent options embedded directly in the form itself.

**Gift Information**

Select Gift Amount:

- Platinum $1,000
- Gold $500
- Silver $100
- Bronze $25
- Enter an amount $

Recurrence:

- Make a one time gift.
- Give once a month.

Comments:

**Permission to Contact**

We want to contact you without overdoing it. Let us know how we should contact you in the future.

Email Options:

Email Consent (Click this to receive email from us)

- Opt-in
- Opt-out

Email Newsletter

- Opt-in
- Opt-out

Mail Options:

Annual Mailing

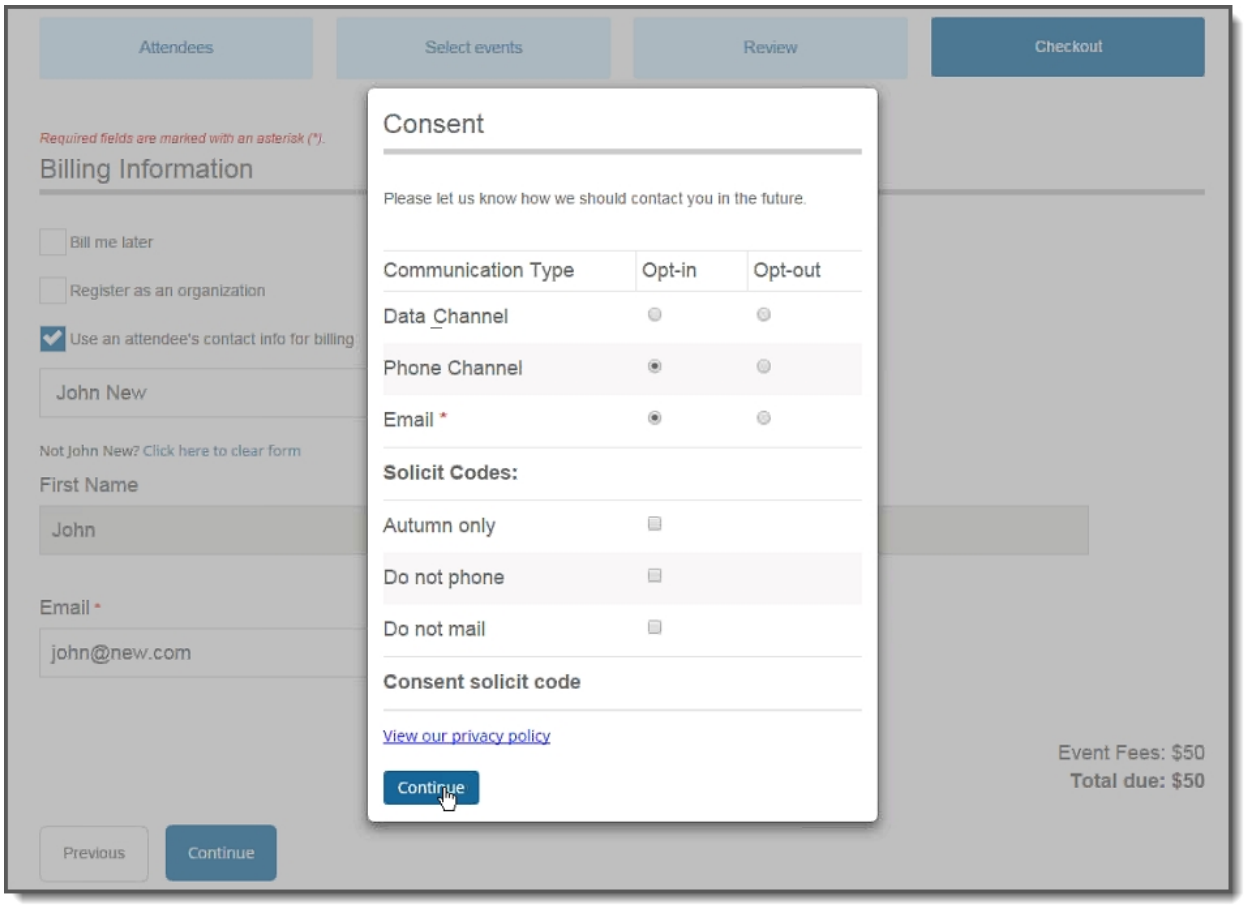
- Opt-in
- Opt-out

Text

- Opt-in
- Opt-out

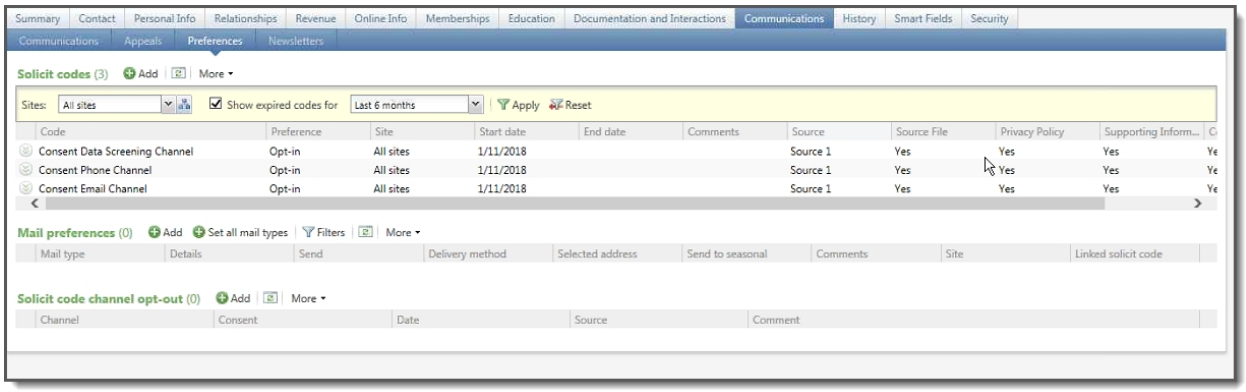
View Privacy Policy

The **Overlay** option displays a pop-up window with the consent options when the form is submitted.




After users submit the form, their consent information is downloaded along with their transaction. After the appropriate batch is committed, their constituent record is updated on the **Communications > Preferences** tab in Blackbaud CRM with their communication consent preferences.

***Note:*** You can expect a lag time of approximately 5 minutes between the time you commit a donation or membership transaction batch and the time the consent preferences are written to the constituent's record in Blackbaud CRM.



After a user has already provided consent preferences, if they fill out a subsequent form that includes the Communication Consent part and they are logged into Blackbaud Internet Solutions, their consent preferences are automatically pre-populated. Users can modify their consent preferences, and the changes are then written to their constituent record when they submit the form.

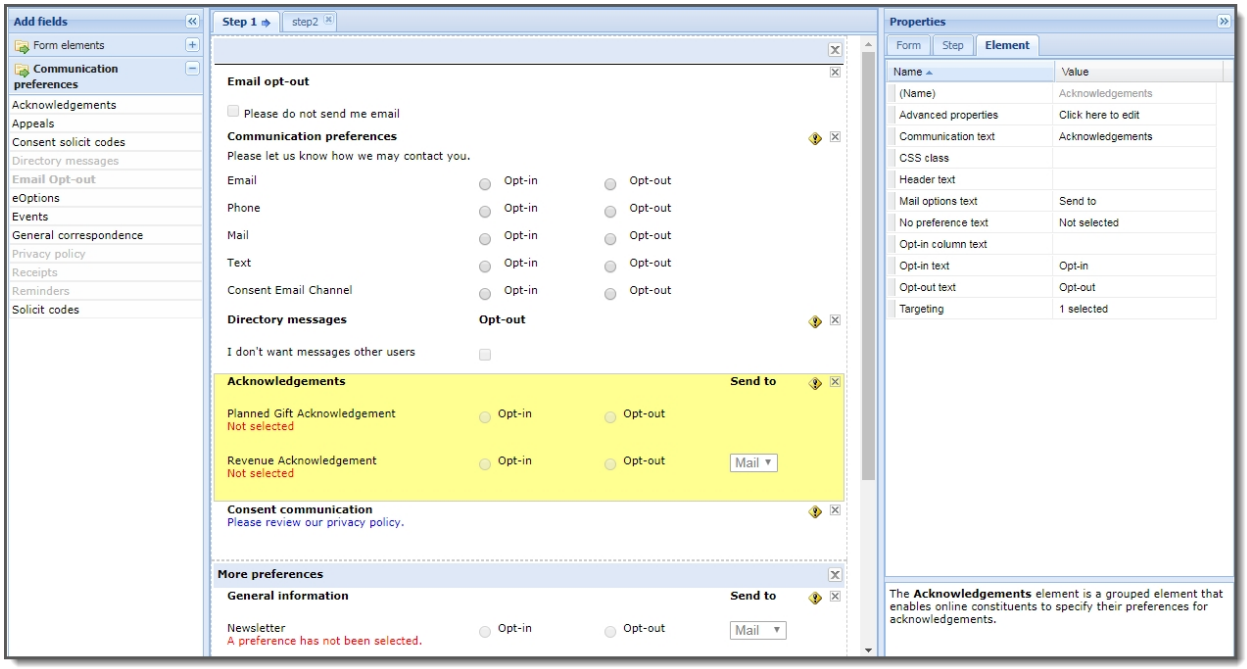
If a transaction is canceled for any reason, the user's consent preference selections for that transaction are not written to their constituent record.

# Communication Preferences Form Enhancements

To support more configuration flexibility, we've made several enhancements to the Communication Preferences form to improve how you can configure the form to capture user consent.

Previously, you could only include one element per type on the form. After an element was added, it was grayed out in the **Add fields** list so that it couldn't be added again. With this enhancement, you can now add multiple instances of the same element type to the form — for example, you can add more than one **Consent solicit codes** element. However, *each element of the same type on the form must have different properties*. Under **Advanced properties**, when you add a property for an element, that property cannot be added again to the same element type on the same form.

In addition, we've changed the default Opt-in text and Opt-out text for the preference options to **Opt-in** and **Opt-out**, respectively. Also, the **No preference** message text now displays directly below the option name when no selection has been made.




When constituents submit their consent preferences via the Communication Preferences form, those preferences are written immediately to their Blackbaud CRM constituent record and display on the

**Communications > Preferences** tab under **Solicit codes**. Consent solicit codes, consent statement, privacy policy, and more consent details are included on the record.

# Service Pack 16

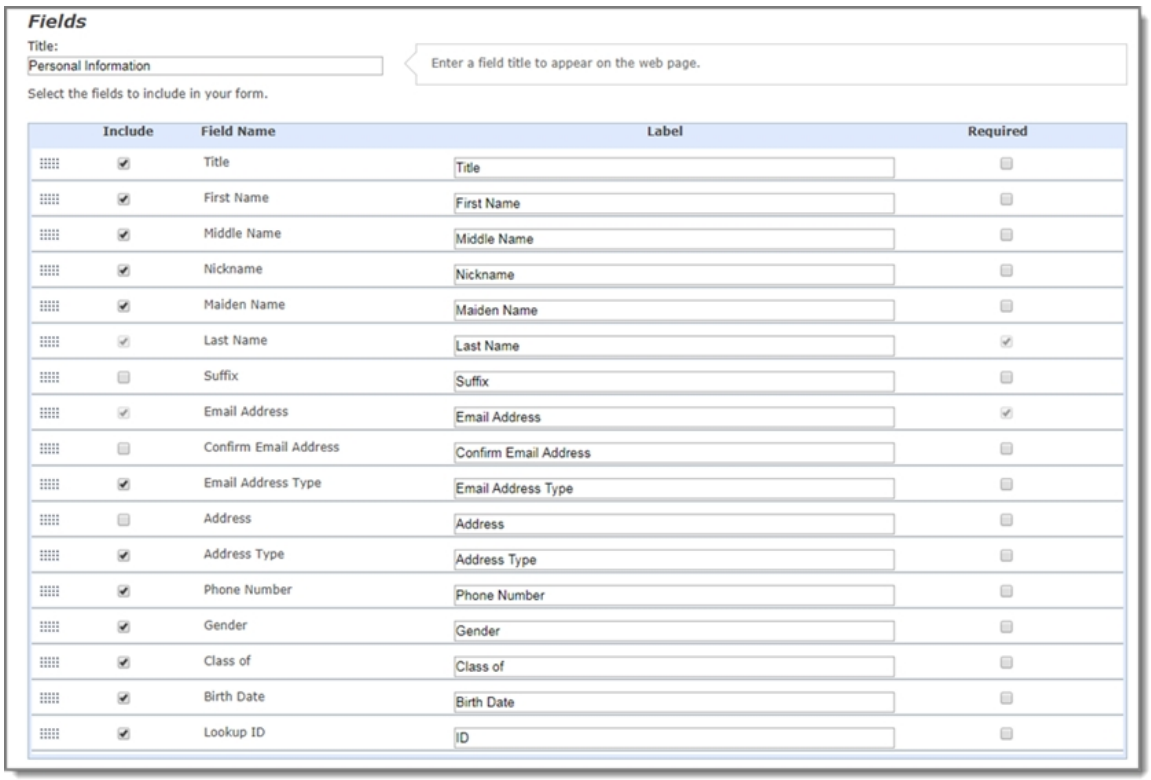
# Acquisition Form Part

The new Acquisition Form part enables your organization to collect constituent information — personal data, constituent attribute information, and communication consent preferences — without requiring constituents to register or log in to your site. You can then download the data to your constituent database in Blackbaud CRM via the Constituent Update Batch process.

***Note:*** Consider using the new Acquisition Form part — instead of the Email Signup Form — to capture email signups going forward. The Email Signup Form will be deprecated in a future release.

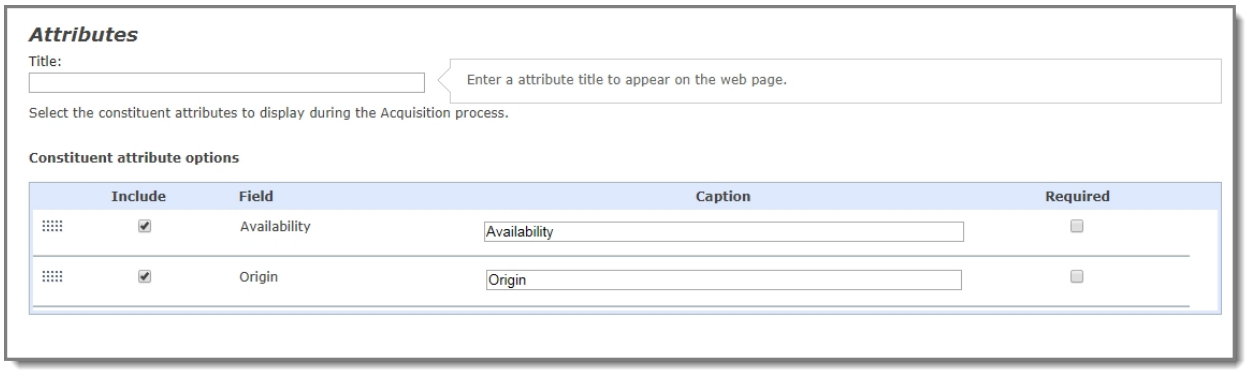
Use the **Design** tab to configure the form and customize it for your organization. Under **General Properties**, enter a **Form Title** that will display to web site users — for example, *Join Our Mailing List*. You can also add a **Form Description** that displays below the form title to provide more information.

Under **Fields**, enter a **Title** for the fields section that displays on the form, and then select which fields to include and whether they are required. The minimum required fields — **Last Name** and **Email Address** — are selected by default and cannot be modified.



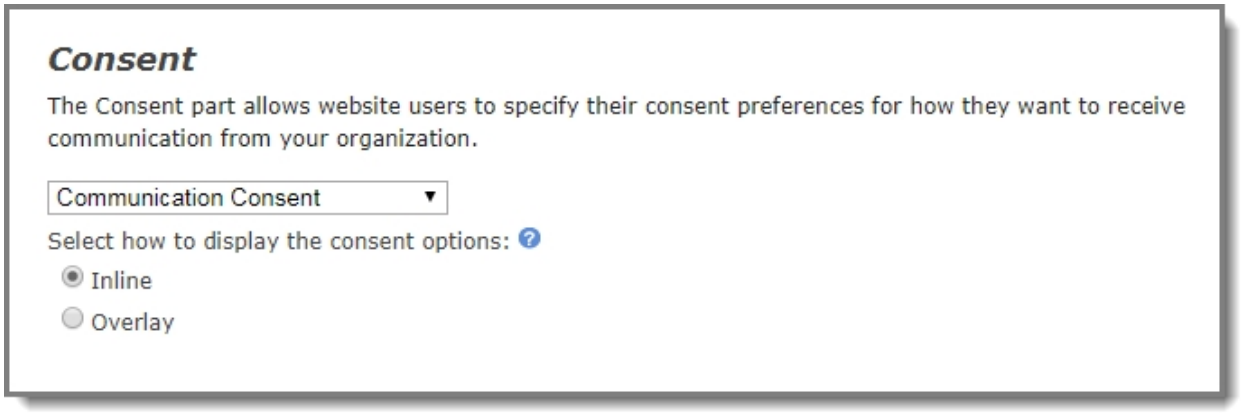
You can change the order in which the fields display on the form by selecting the field's row and dragging up or down in the list.

Under **Attributes**, enter a **Title** for the constituent attributes section that displays on the form. Then, select which constituent attributes from Blackbaud CRM to **Include** on the form and whether they are **Required** fields. Typically, you display attributes when you have multiple options and you want users to subscribe to emails that match their preferences. Constituent attributes are not required to configure the form, but is recommended to comply with email opt-in best practices.



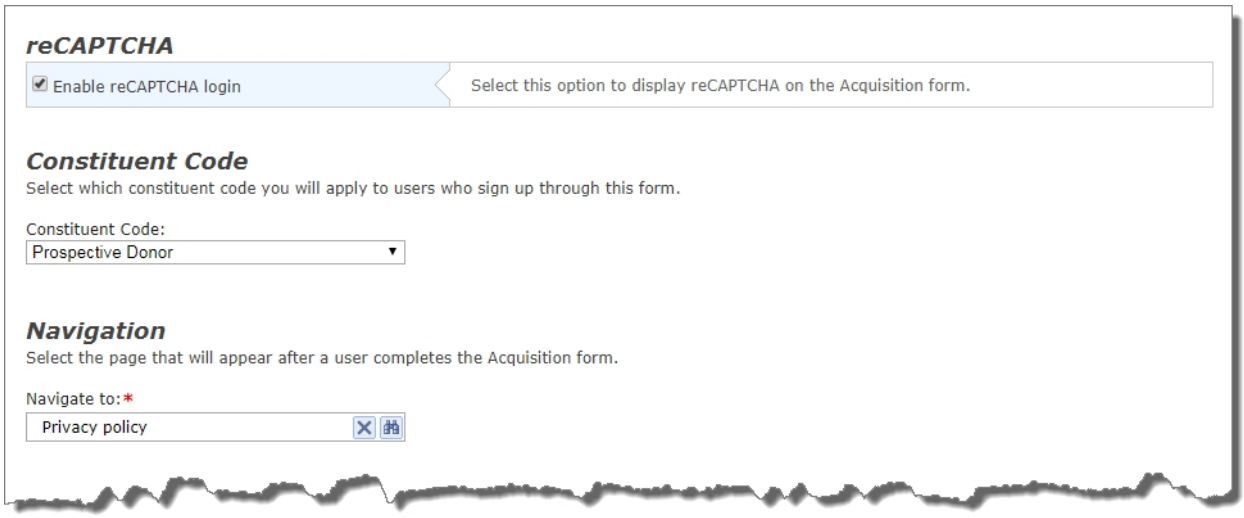

***Note:*** Only those constituent attributes you enabled in *Sites & settings* that have a type of **Yes/No**, **Table**, and **Text** are available to display on the form.

Under **Consent**, to enable users to specify their consent preferences for how they want to receive communication from your organization, choose an existing Consent part to include on the form. You can specify how you want the consent preference options to display — choose **Inline** to embed the options directly in the form itself or choose **Overlay** to display a pop-up window with the consent options when the form is submitted.



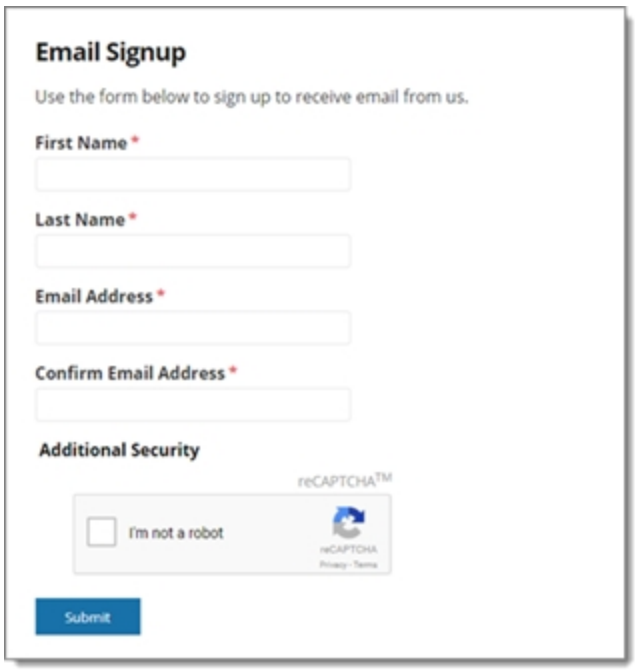

To ensure users are not automated programs to generate spam or phish for information, select **Enable reCAPTCHA login** to display reCAPTCHA on the Acquisition Form. You can also optionally specify a **Constituent Code** from Blackbaud CRM to apply to users who sign up using the form.

Under **Navigation**, select the web page to display to users when the form is completed. Select the binoculars to display the list of pages on your site to choose from. This field is required.




As a last step, select **Acknowledgment Email** to configure the confirmation email to display after users submit the form. The **Name of email**, **Subject**, **From address**, and **From name** fields are required. You can edit the default text for the email message.

Here's an example of how the Acquisition Form displays on your website:




To enable you to download transactions from the new Acquisition Form, we've made some enhancements in Blackbaud CRM for batch assignments. The **Signup** transaction type is now called **Signup/Acquisition**, and there is a new **Acquisition** transaction type. So, you can choose which transactions — either **Signup**, **Acquisition**, or both — to include in the batch assignment.

Transactions from the Acquisition Form are downloaded to the Constituent Update Batch. When you commit the batch, data captured on the Acquisition Form is written to the constituent's record — the record is created for new constituents and updated for existing constituents.

***Note:*** Any existing Signup batch will have its **Transaction type** automatically changed to **Signup/Acquisition** and its **Include transaction type** option set to **Signup** by default. You can edit any of these batch assignments to also include the **Acquisition** transaction type.

# Service Pack 17

# Event Registration Form Enhancements

To streamline the user experience when registering for a single event on the Event Registration form, we've added the following enhancements to the form.

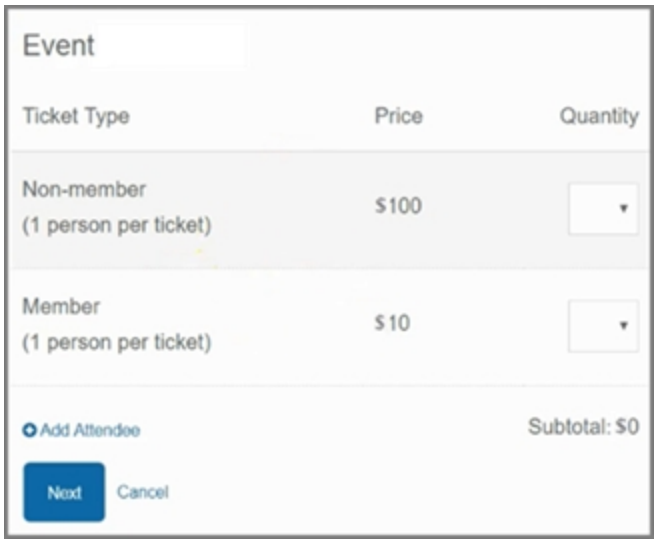
## Single events with one ticket type

When there's only one event configured on the Event Registration form — and there's only one ticket type — the number of attendees is automatically pre-populated for the ticket type. This enables the registrant to quickly proceed through the registration process for a single event without having to manually enter information.

In addition, because selecting events is not necessary when registering for a single event with one ticket type, the **Select events** tab doesn't display. Each attendee is automatically registered for the single event.

## Single events with multiple ticket types

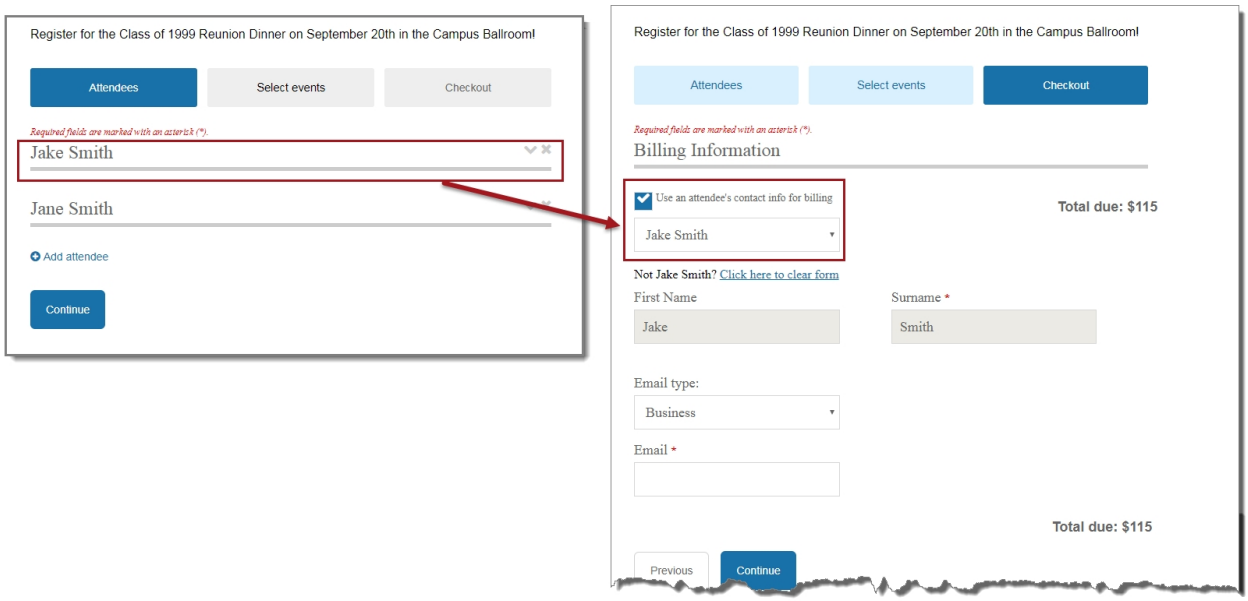
When there's only one event configured on the Event Registration form — and there are multiple ticket types — the **Select events** tab still displays but is used only to select the ticket type of each attendee.



## First attendee automatically selected as host on Checkout page

To save registrants mouse-clicks when specifying billing information for an event, the first named attendee displayed on the Attendees page is now automatically listed as the host on the Checkout page.

With this enhancement, Blackbaud Internet Solutions assumes that the first attendee is paying for the event, and pre-populates that person's contact information for billing on the Checkout page.

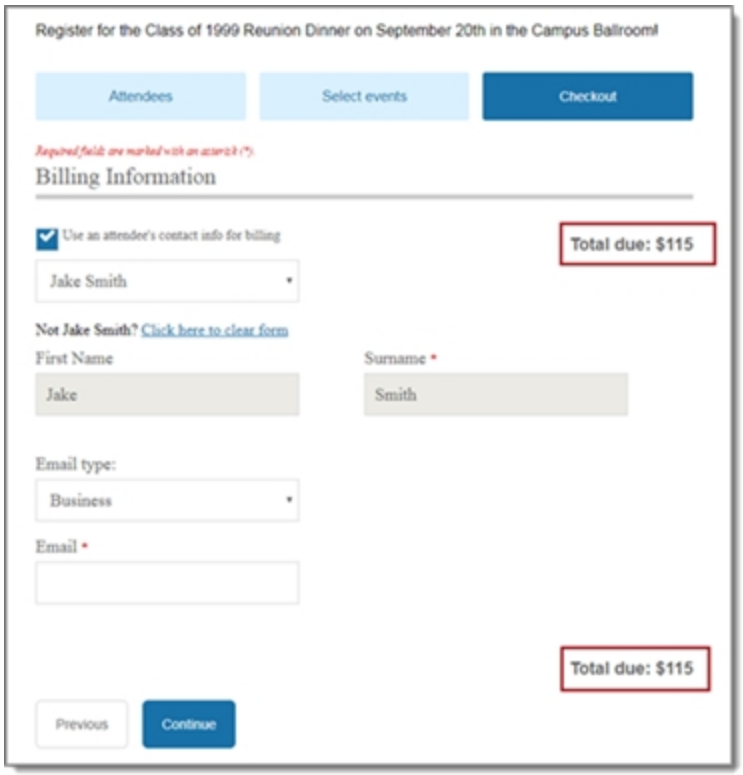



You still have the option to select a different attendee as the host from the drop-down list of attendees. If the host is not attending the event —but is being billed for it — you can select **Click here to clear the form**, then enter the host's contact information.

***Note:*** An unnamed attendee cannot be recognized as a host.

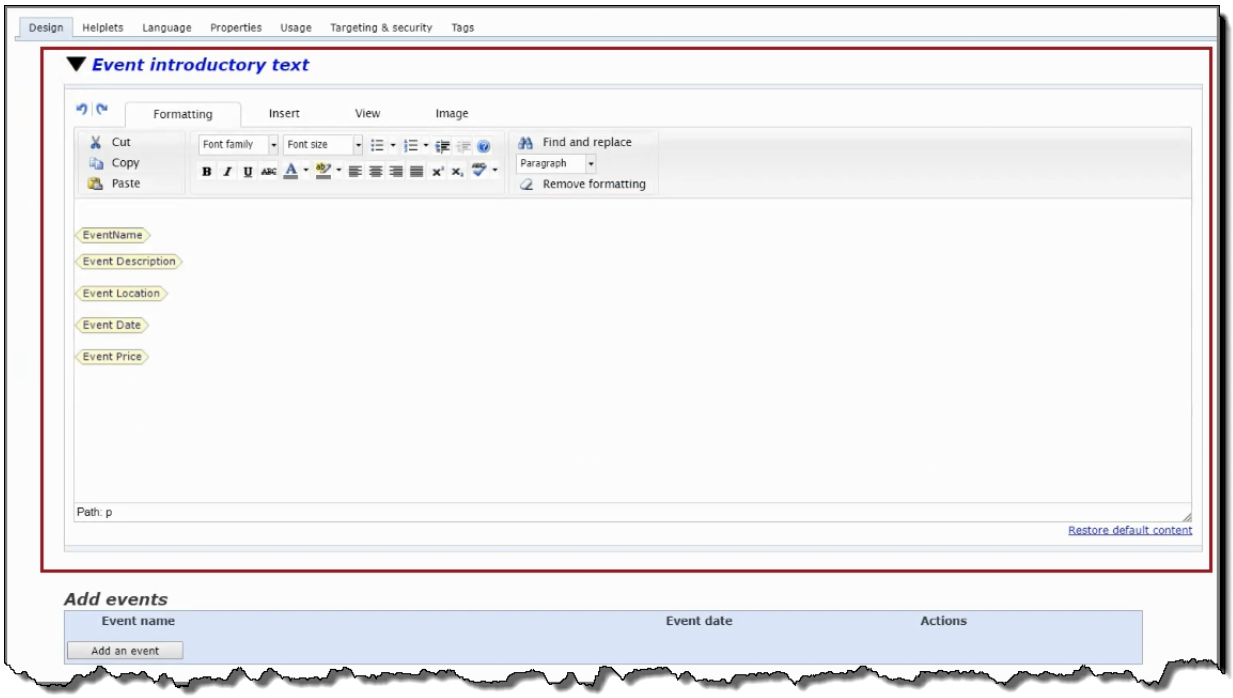
## Total amount due added to top of Checkout page

To enable registrants to view the total amount due for events without having to scroll down on the Checkout page, the **Total due** amount is now shown both at the top and at the bottom of the page.



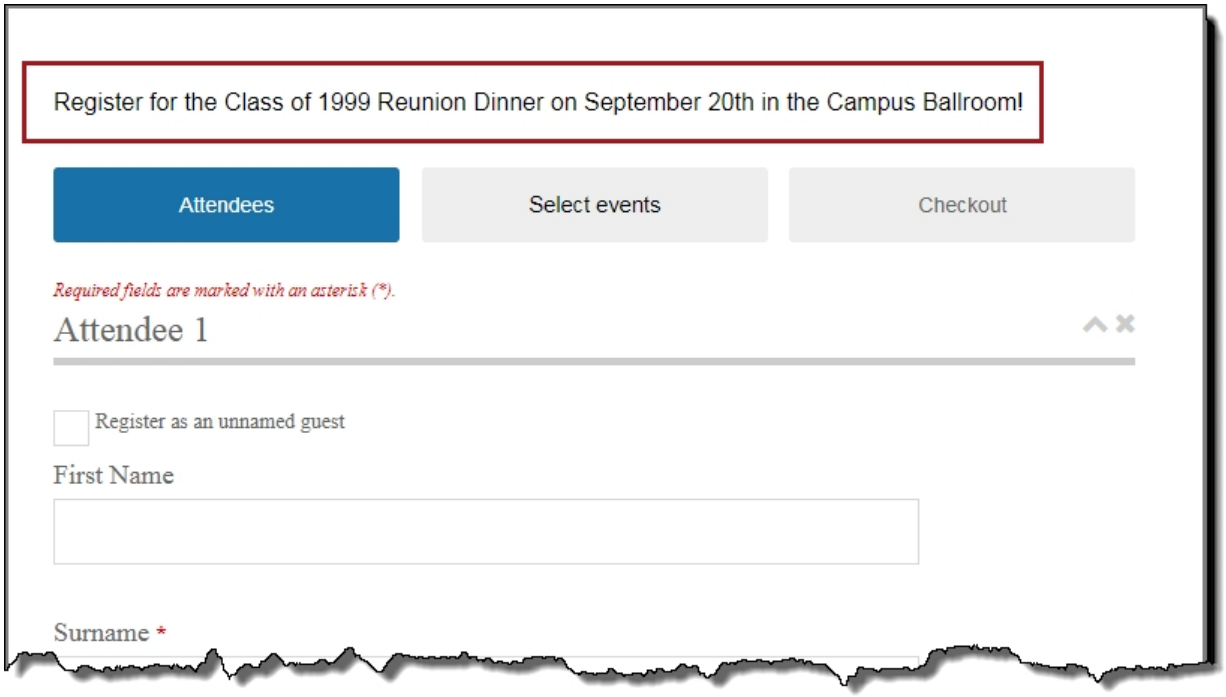

## Ability to include event information on the form

To enable you to provide users with introductory text about a single event directly on the Event Registration form, we've added a WYSIWYG editor to the part's Design tab. Now, you can include event information — using event merge fields or by creating custom content — at the top of the Event Registration form.




On the Design tab for the Event Registration form part, there's a new **Event introductory text** section. You can use this WSIWYG editor to specify information to include at the top of the form. By default, the merge fields **EventName**, **Event Description**, **Event Location**, **Event Date**, and **Event Price** are included. You can apply styling, add additional custom content, or remove any of the merge fields.

The introductory text displays to users at the top of Event Registration form above the registration steps.

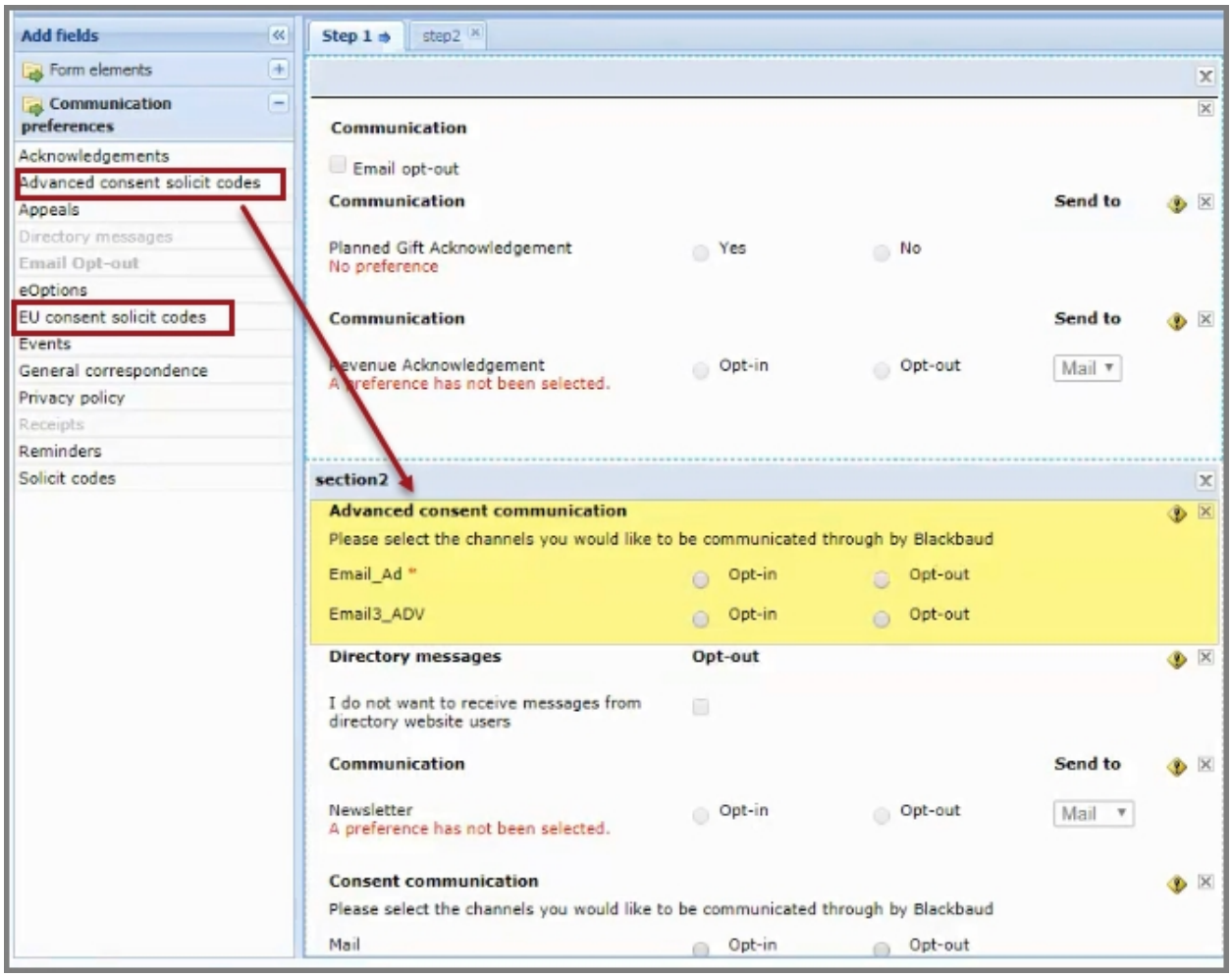


# Support for Advanced Consent Solicit Codes

Blackbaud CRM has added a new Advanced Consent solicit code type which is similar to the EU Consent solicit code type, but is more applicable for non-EU customers. To support this new code type and enable you to collect Advanced Consent solicit codes configured in Blackbaud CRM, we've made several enhancements to the Communication Preferences form.

## New Advanced consent solicit codes element

The new **Advanced consent solicit codes** element lists advanced consent solicit code options, enabling constituents to explicitly opt-in or opt-out of a specific communication channel. You can configure which advanced consent solicit codes to include on the form by using the Element tab in the Properties pane. Select **Advanced properties**, then specify the advanced consent solicit codes from Blackbaud CRM you want to include on the form, the text to display for each code, and which codes require a consent selection.



### Consent solicit code element renamed

In this release, we've renamed the previous **Consent solicit code** element to **EU consent solicit codes** to be consistent with the solicit code's naming convention used in Blackbaud CRM.

### Email opt-out element

With this release, you can now select any solicit code, consent solicit code, or advanced consent solicit code to use for the global **Email opt-out** element.

***Note:*** The **Solicit codes**, **EU consent solicit codes**, and **Advanced consent solicit codes** elements are only available to include on the Communication Preferences form if there are corresponding solicit code types configured in Blackbaud CRM.

# Consent Data written to Enhanced Revenue Batch

To provide consistency with the consent solicit code functionality in the Constituent Update Batch, consent information collected from donation transactions in Blackbaud Internet Solutions is now written to Blackbaud CRM through the Enhanced Revenue Batch.

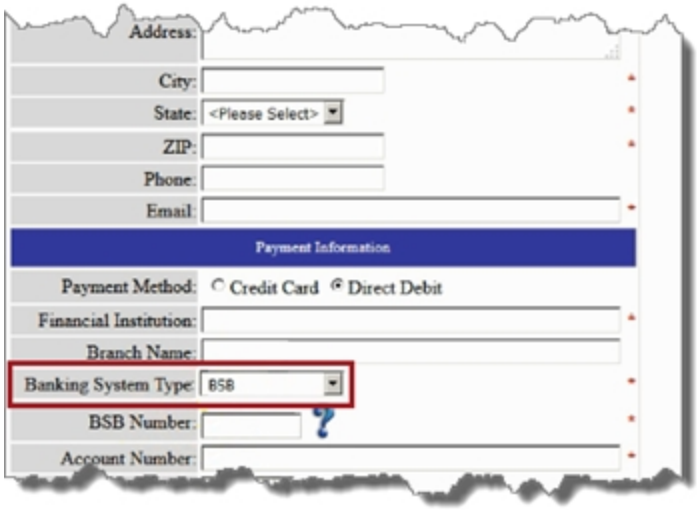
Blackbaud CRM has added solicit code batch support — similar to the solicit code functionality in the Constituent Update Batch — to the Enhanced Revenue Batch. Previously, consent information from donations was written into a Blackbaud CRM constituent record as a business process. With this enhancement, consent preferences specified in Blackbaud Internet Solutions donation transactions on the Advanced Donation form, Donation form, and Payment 2.0 part are now included in the Enhanced Revenue Batch. Once the batch is committed, the consent preferences are written to the constituent records in Blackbaud CRM.

# Custom Validation for Direct Debit Payment Fields

To resolve issues with direct debit validation for countries other than the United States and Canada, we've made enhancements to the direct debit validation on the Donation Form and Payment 2.0 Form. Previously, the routing number field only validated 9-character US/Canada routing numbers, which was causing issues for BSB, SEPA, and other banking types that have other character validation requirements.

Now, with this enhancement, direct debit payment fields are labeled using the captions set in Blackbaud CRM Banking Systems, and are driven by the banking systems enabled for your organization. A new **Banking System Type** field enables donors to select another banking type — if more than one banking system type is enabled in Blackbaud CRM, or if Australia is selected as the donor country together with the USA banking system. The **Routing Number** field name changes to reflect the

selected banking type. For example, if **BSB** is the selected banking type, the **Routing Number** field displays as **BSB Number**. The information users enter in this field is then correctly validated in accordance with the selected banking type.




# Service Pack 18

# New Frequency for Recurring Gifts

You can now schedule recurring gifts with the new **Every 4 weeks** frequency. When you add or edit a recurring gift, you can choose this frequency and the gift will be processed every 4 weeks exactly, which allows you to collect a 13th installment. This new frequency option is supported on the following parts:

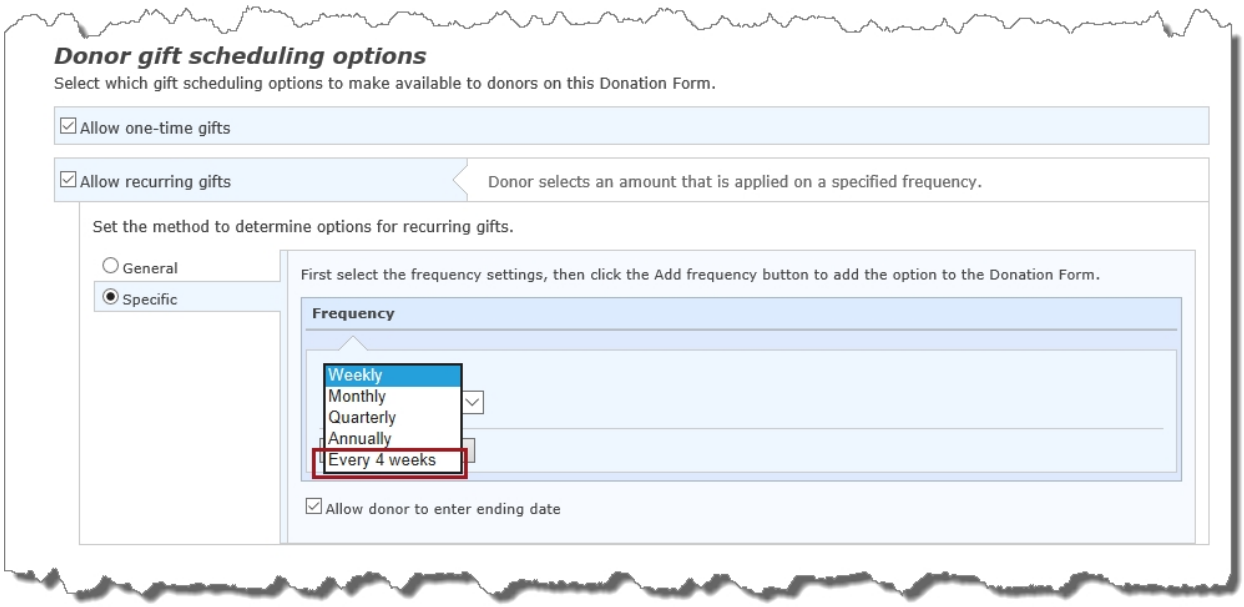
- Donation Form
- Advanced Donation Form
- Transaction Manager

One benefit of the new frequency is that it enables donors to schedule an additional installment per year. Previously, donors could select the **Monthly** option, which allowed for a maximum of 12 gift installments per year. The new **Every 4 weeks** frequency option enables users to schedule another installment — for a maximum of 13 — per year.

As with other recurring gift frequencies, the **Every 4 weeks** installment frequency information from donation transactions on these forms in Blackbaud Internet Solutions is downloaded and written to Blackbaud CRM through the Enhanced Revenue Batch.

## Configure the Donation Form

On the Design tab under **Donor gift scheduling options**, select **Allow recurring gifts** to display the recurring gift options.




- When you select **General**, donors can determine the frequency of the recurring gift. On the Donation Form, they'll now be able to select a giving frequency of **Every 4 weeks**. When they choose this option, donors are required to enter a start date for the recurring gift.
- When you select **Specific**, you define the recurring gift schedules donors can choose. You can now select to include **Every 4 weeks** as the frequency.

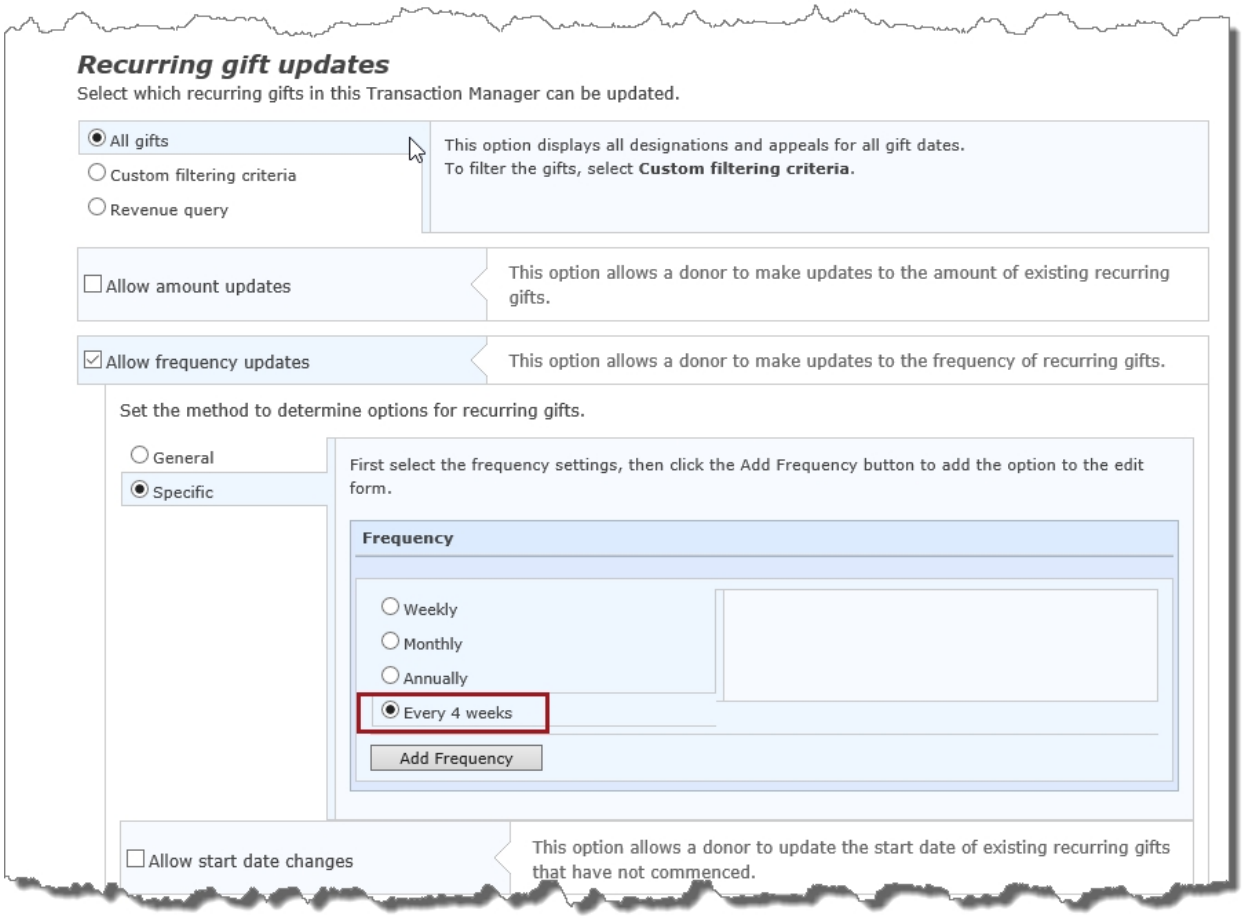
***Note:*** You can modify the **Every 4 weeks** caption text on the Language tab under the **Recurrence Frequency** category.

# Configure the Advanced Donation Form

When creating your custom donation experience using the Advanced Donation Form part, you can now include HTML for a frequency option value of **Every 4 weeks** for recurring gifts. For more information about designing the form, see the Advanced Donation Form Developer Guide.

# Configure the Transaction Manager

On the Design tab under **Recurring gift updates**, select **Allow frequency updates** to display the recurring gift options.

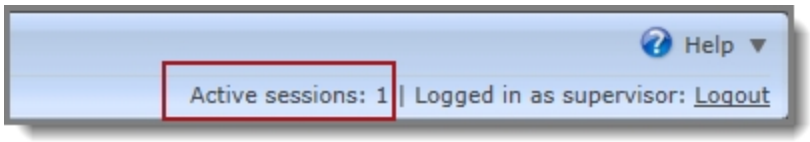



- When you select **General**, donors can determine the schedule for their recurring gift payment. On the Transaction Manager, donors can now select a giving frequency of **Every 4 weeks** when making changes to their recurring gift. When they choose this option, donors are required to enter a start date for the recurring gift.
- When you select **Specific**, you define recurring gift schedules for donors to select from. You can now select to include **Every 4 weeks** as the frequency.

***Note:*** You can modify the **Every 4 weeks** caption text on the Language tab under the **Recurrence Frequency** category.

# Concurrent Sessions

Blackbaud Internet Solutions now displays the total number of concurrent active sessions for users with administrative rights. An active session is defined as a login from a unique IP address. For example, if you are logged into Blackbaud Internet Solutions from your work computer and from your home computer at the same time, the display will show that there are 2 active sessions. Logins from multiple browsers on the same computer are not considered as separate active sessions.




# Donation Form is now WCAG 2.0 AA Compliant

In our ongoing effort to ensure Blackbaud Internet Solutions commonly-used parts meet accessibility standards, we're pleased to announce that the Donation Form part now meets the Web Content Accessibility Guidelines (WCAG) 2.0 level AA compliance guidelines.

# reCAPTCHA Key Validation

To resolve integration issues with Blackbaud Internet Solutions that resulted from updates to reCAPTCHA, we've added the ability for administrators to validate their reCAPTCHA keys.

In **Administration, Sites & settings**, under **reCAPTCHA**, you can now verify that the public and private keys that you enter are correct. After you configure or update the keys, click the **Validate** button. The reCAPTCHA challenge displays, and once you've completed the challenge, a message displays to let you know whether or not the keys are valid.

# jQuery Version Upgrade

With this release of Blackbaud Internet Solutions, we have upgraded the jQuery version from 1.12.3 to 3.3.1. If you use custom JavaScript on your Blackbaud Internet Solutionspages, we recommend additional testing to ensure this has not affected your user experience.

# Service Pack 19

# Blackbaud Checkout Enhancements

To enable organizations to customize the theme on the Blackbaud Checkout page, we've implemented a new option in **Sites & settings**. Because some organizations have branding guidelines that must be followed, this enhancement allows administrators to change the font and colors on the Blackbaud Checkout page to match your organization's brand. You can specify a theme to use site-wide and you can also override the site-wide theme on individual forms.

Under *Administration, Sites & settings*, you can select the site you want to customize the Checkout page for, then select the **Settings** tab.

In **Blackbaud Checkout Theme Options**, you can specify the default colors to use as the **Primary color** and **Secondary color** for the Checkout page used on your site. You'll need to enter the 6-digit hexidecimal value — such as #FF0000 — for the desired color. In **Font**, you can change the default font (Roboto) for text displayed on the Checkout page by selecting from the list of available fonts.

On the Checkout page:

- **Primary color** is used on form buttons, the footer, and field highlights
- **Secondary color** is used for the background of validation errors
- **Font** is used for the header text, footer text, and all content

When the administrator has configured the Blackbaud Checkout theme, all checkout overlays displayed from anywhere on the site will display the font, primary color, and secondary color that were specified, unless you've overridden the site-wide defaults on an individual part.

# Enhancements to the Donation Form - Mini Part

In this release, we've made several enhancements to the Donation Form - Mini part.

## Support Apple Pay

Apple Pay is now available to donors as a secure checkout option.

Previously, this was only available for organizations in the Apple Pay Early Adopter Program (EAP); now it is Generally Available.

## Removed "Beta" Designation from Part Name

The Donation Form - Mini part is no longer in beta status. We've removed "Beta" from the part name to reflect this.

## Donation Form - Mini is now AA Compliant

In our ongoing effort to ensure Blackbaud Internet Solutions commonly-used parts meet accessibility standards, we're pleased to announce that the Donation Form - Mini part now meets the Web Content Accessibility Guidelines (WCAG) 2.0 level AA compliance guidelines.

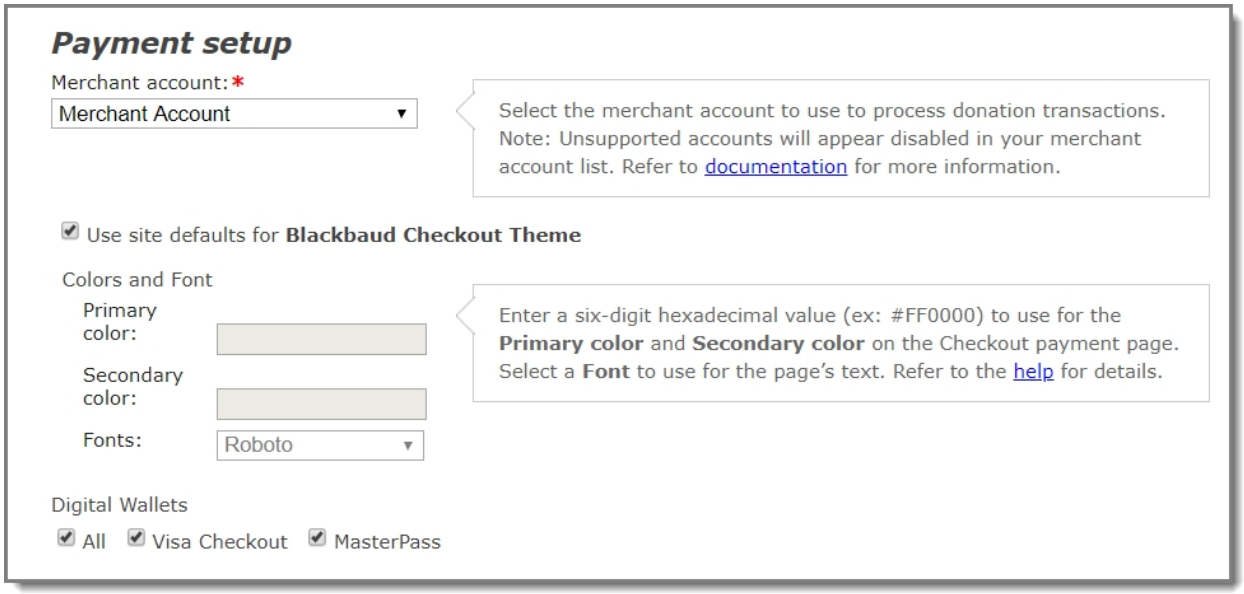
## Checkout Page — Separate First Name and Last Name Fields

Constituent records in Blackbaud CRM use separate **First Name** and **Last Name** fields. Previously, Blackbaud Internet Solutions used a single Cardholder Name field for Blackbaud Checkout, which resulted in matching issues in Blackbaud CRM, since Blackbaud Checkout allows the Cardholder Name to be collected as a separate first name and last name, Blackbaud Internet Solutions will now always use these separate fields for data accuracy.

## Checkout Page — Customize Page Theme and Digital Wallets

On the Design tab, when you select a merchant account under **Payment setup** that supports Blackbaud Checkout, you'll see the **Use site defaults for Blackbaud Checkout Theme** option. This setting is selected by default, and refers to the **Blackbaud Checkout Theme Options** specified in *Administrator > Sites & settings*.

To override the site-wide default checkout theme, clear the **Use site defaults for Blackbaud Checkout theme** option to enable the fields where you can enter values for the **Primary color** and **Secondary color**, and select a different font.



In addition, under **Digital Wallets**, you can choose which forms of payment — Visa Checkout or MasterPass — are accepted during checkout. By default, all payment methods are selected.

***Note:*** Digital wallets are only available for BBMS customers.

# Event Registration Form Enhancements

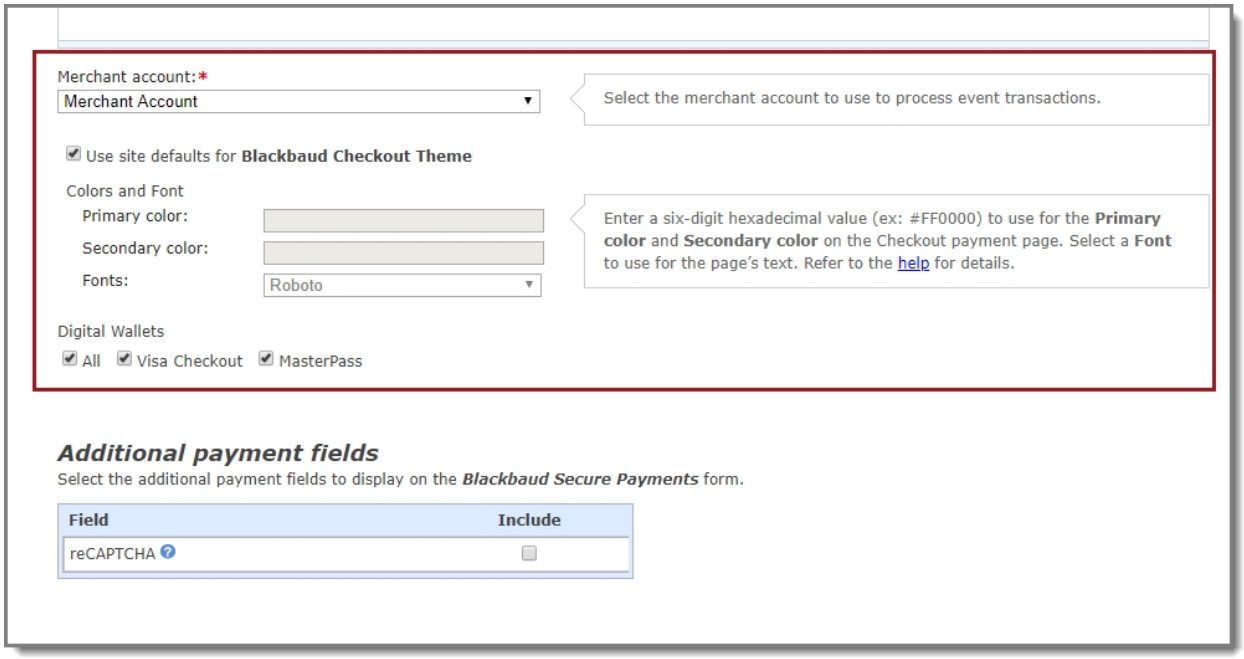
We've made the following enhancements to the Event Registration Form 2.0.

## Blackbaud Checkout

Previously, the Blackbaud Secure Payment page was used to take payments through the Event Registration Form 2.0. Now, the form uses PCI-compliant Blackbaud Checkout *for BBMS customers*, so credit card and merchant account information is processed and stored on a Blackbaud-hosted secure server.

On the Design tab, when you select a merchant account under **Payment options** that supports Blackbaud Checkout, you'll have the option to specify the checkout theme. You can use the default option — **Use site defaults for Blackbaud Checkout Theme** — which uses the settings specified in the **Blackbaud Checkout Theme Options** specified in *Administrator* > *Sites & settings*.

To override the site-wide default and customize the checkout theme, clear the **Use site defaults for Blackbaud Checkout theme** option to enable the fields where you can enter values for the **Primary color** and **Secondary color**, and select a different font.



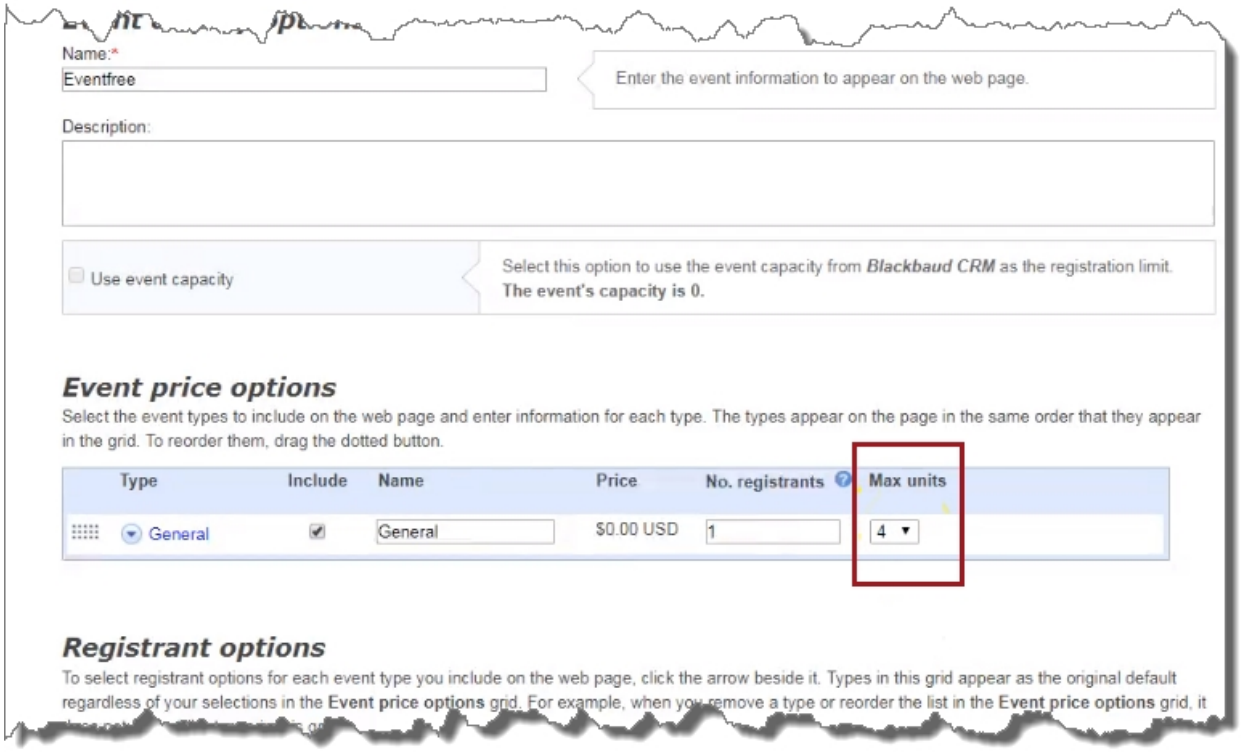

In addition, under **Digital Wallets**, you can choose which forms of payment — Visa Checkout or MasterPass — are accepted during checkout. By default, all payment methods are selected.

***Note:*** Digital wallets are only available for BBMS customers.

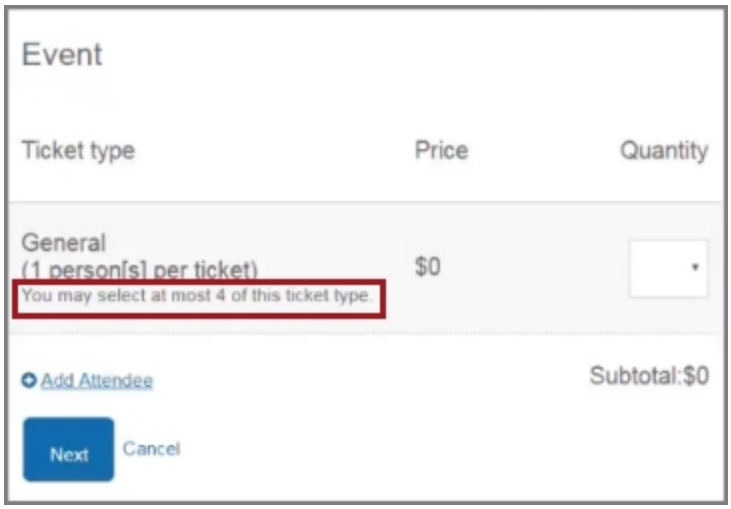
## Per Pricing Option Limits

To enable administrators to limit the number of registrations per ticket option for an event, you can now configure per pricing option limits.

When you edit an event, under **Event price options**, there's a new **Max units** setting. Use this setting to select the maximum number of tickets for the event option.




For example, if you set the **Max units** to 4, registrants cannot register more than four people for that event option. A message displays if there is a maximum ticket limit when registrants add attendees for an event.

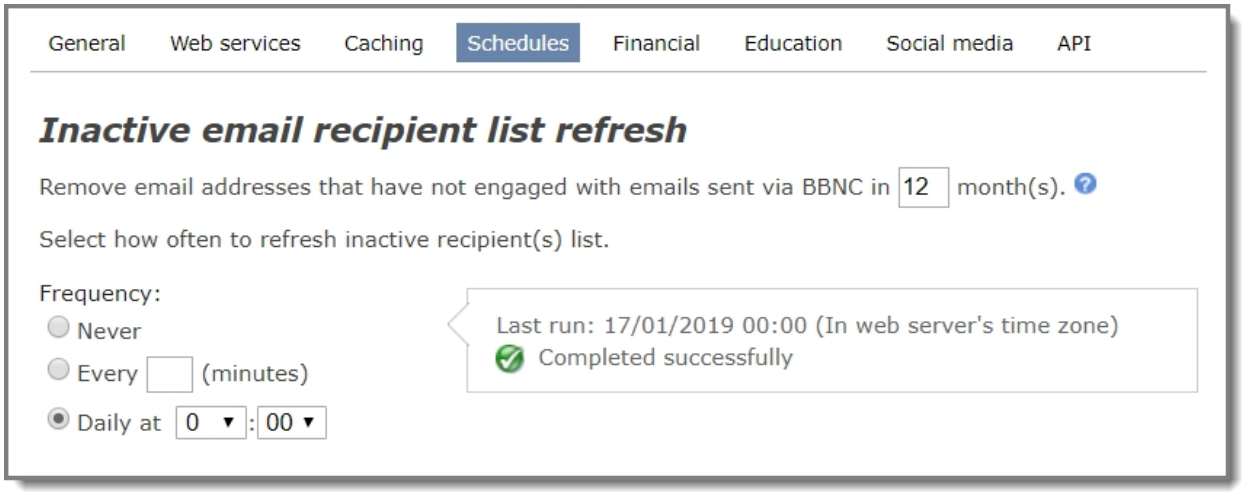



You can use the **Language** tab to customize text that displays on the form. For example, you can modify the text for the **Maximum registrants per pricing option** item to customize the message displayed for the per pricing option limit for a ticket type.

# Remove Unengaged Users When Sending Emails

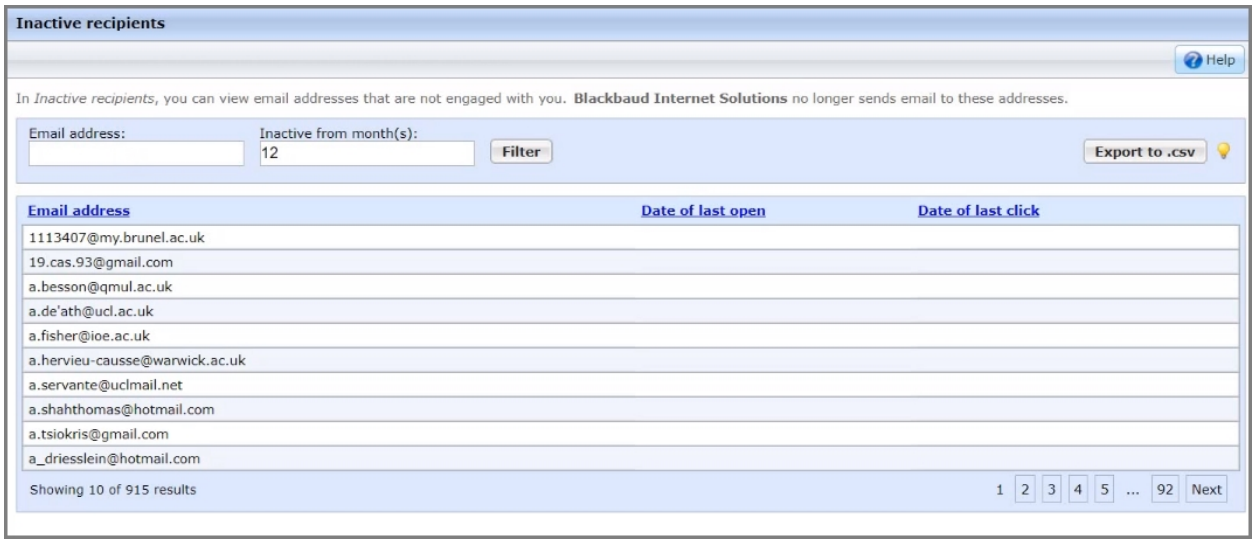
To enable you to remove unengaged users — those who haven't interacted with an email via an open or a click in a specified period of time — from emails sent through Blackbaud Internet Solutions, we've made an enhancement to the email settings.

On the **Schedules** tab in *Administration* > *Sites & settings*, we've added **Inactive email recipient list refresh** settings that enable administrators to set the frequency that the business process will run to remove email addresses that have been inactive for the specified number of months.

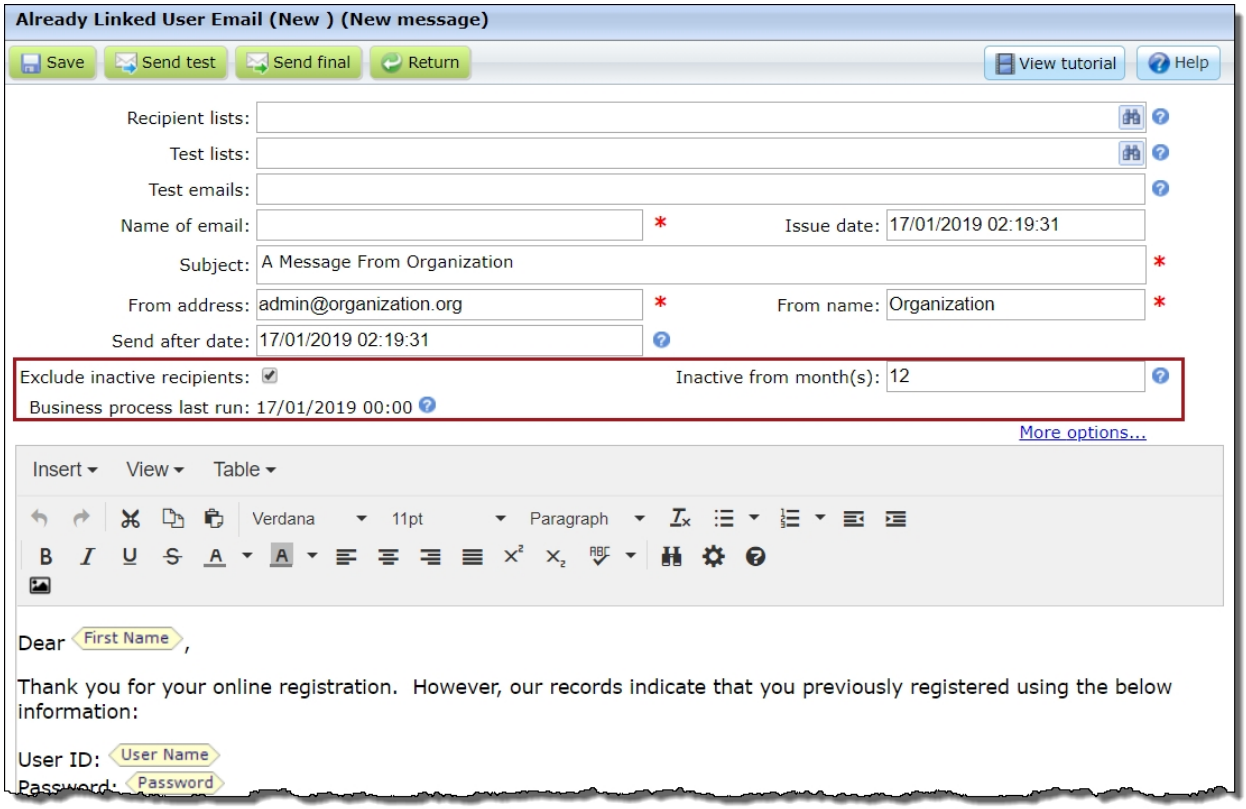



In *Email* > *Inactive recipients*, you can see a list of email addresses for inactive recipients, based on the criteria specified in the **Inactive email recipient list refresh** settings in *Administration* > *Sites &*

*settings*. The value displayed in **Inactive from month(s)** defaults to the value specified in *Administration* > *Sites & settings*, but you can modify it to change the filter criteria. The **Date of last open** and **Date of last click** for each email address is also displayed.




When you create a new message in *Email* > *Messages*, you can select the **Exclude inactive recipients** option and specify the number of months (**Inactive from month(s)**) that recipients have been inactive. The value displayed in **Inactive from month(s)** defaults to the value specified in *Administration* > *Sites & settings*, but you can modify it. When you select **Send Final**, the email will not be sent to the inactive recipients that meet the specified criteria.



You can also select the **Exclude inactive recipients** and **Inactive from month(s)** options on email templates. This enables you to configure these settings on a template, and then any email messages created from the template will default with the values from the template.

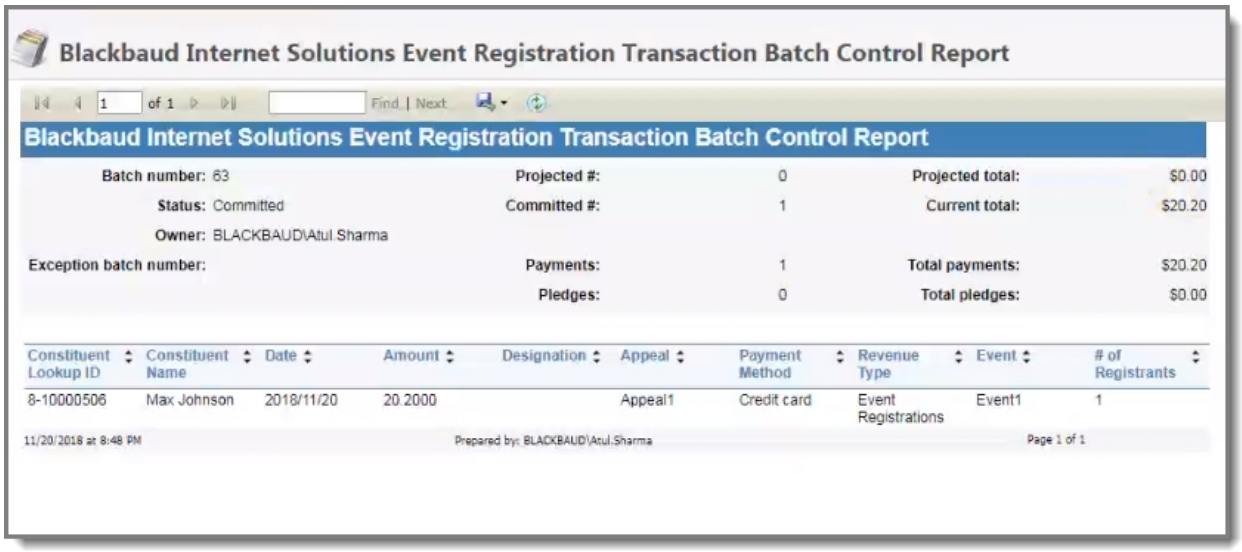
***Tip:*** For more information about unengaged/inactive users, see the Engagement and Email Deliverability Resources blog post.

# Event Batch Control Report Updates

To enable the Blackbaud Internet Solutions Event Batch Control report to provide applicable information for finance reconciliation and other processes, we've updated the report to include more details.

Previously, when you created the Blackbaud Internet Solutions Event Batch Control report after committing an event registration transaction batch, the only information displayed in Blackbaud CRM was the registrant name. Now, the report includes the batch summary details, and records containing information about registrants and registered events is displayed such as:

- Registrant name
- Registration option
- Registration amount
- Number of registrants



Blackbaud Internet Solutions Event Registration Transaction Batch Control Report

1 of 1 Find | Next

Blackbaud Internet Solutions Event Registration Transaction Batch Control Report

| | | | | | |
|---|---|---|---|---|---|
| Batch number: | 63 | Projected #: | 0 | Projected total: | $0.00 |
| Status: | Committed | Committed #: | 1 | Current total: | $20.20 |
| Owner: | BLACKBAUD\Atul.Sharma | | | | |
| Exception batch number: | | Payments: | 1 | Total payments: | $20.20 |
| | | Pledges: | 0 | Total pledges: | $0.00 |

| Constituent Lookup ID | Constituent Name | Date | Amount | Designation | Appeal | Payment Method | Revenue Type | Event | # of Registrants |
|---|---|---|---|---|---|---|---|---|---|
| 8-10000506 | Max Johnson | 2018/11/20 | 20.2000 | | Appeal1 | Credit card | Event Registrations | Event1 | 1 |

11/20/2018 at 8:48 PM Prepared by: BLACKBAUD\Atul.Sharma Page 1 of 1

# WCAG 2.0 AA Compliant Forms

In our ongoing effort to ensure Blackbaud Internet Solutions commonly-used parts meet accessibility standards, we're pleased to announce that Donation and Membership forms using the Payment 2.0 part, as well as the Mini Donation Form, now meet the Web Content Accessibility Guidelines (WCAG) 2.0 level AA compliance guidelines.

# Service Pack 20

## Email Reports about Unengaged Users

New email reports will now show data about unengaged recipients. This enables you to better understand unengaged users — those who haven't interacted with an email via an open or a click in a specified period of time.

Previously, these were also known as "inactive" recipients. Therefore, we've updated the terminology throughout the user interface to now use the term "unenaged" instead of "inactive."

However, email reports which existed prior to this release remain unchanged and will not show this new data.

***Tip:*** For more information about unengaged/inactive users, see the Engagement and Email Deliverability Resources blog post. A previous update enabled you to choose to exclude unengaged users from emails. For information about the previous update, see Remove Unengaged Users When Sending Emails.

## Additional Bounce Statuses

This release includes additional bounce statuses. These provide users with more information about email addresses which were blacklisted due to spam complaints and emails previously marked as hard bounces.

When you review unenaged recipients (who have inactive addresses), these additional bounce statuses now appear in the list of emails that were not sent. You can filter the list based on these new statuses.

New bounce statuses also appear with the inactive email address on a recipient's contact record and in the **Blacklisted Email Addresses** tab in ***Blackbaud CRM***.

For information about bounced emails and best practices for emails, refer to Blackbaud's Email Resource Center.

## Constituents to Review Spam Complaints

You can add a new element to the **Communication Preference Form** to enable online constituents whose email address is associated with a spam complaint to review their email address and learn how to remove their email address from the blacklist.

When you include the **Spam Compliance** element on the **Communication Preference Form**, the form will show an icon and a customizable message to inform the individual that their email address previously reported spam and thus emails can't be sent to that address for compliance reasons. The element also includes a customizable message and URL to a **Blackbaud KnowledgeBase** article which provides instructions which the user can follow to remove the user's email address from the email suppression list.

Additionally, this release helps organizations respect a recipient's right to unsubscribe. When a recipient opens an email in a supported email browser, an unsubscribe link can appear near the top of the email. The recipient can select the link to indicate the individual wants to globally unsubscribe from all emails sent by your organization. Recipients who unsubscribe are marked as not wanting emails and are handled as though the recipient had unsubscribed (globally) from the ***Blackbaud Internet Solutions*** communication preference form.

# Unsent Email for a Constituent

In ***Blackbaud CRM***, the **Communications** tab of a constituent record will now indicate that an email your organization intended for the constituent was not sent.

Previously, all emails which included the constituent's email address as an intended recipient were shown without distinctions. With this release, an alert icon appears next to any email that couldn't be sent due to a spam complaint, a hard bounce, a previous hard bounce, or a soft bounce. This enables you to review which messages did not reach the intended recipient and the reason for the delivery error.

The alert appears for email errors regardless of whether the email was generated from ***Blackbaud Internet Solutions*** or ***Blackbaud CRM***.

For information about bounced emails and best practices for emails, refer to Blackbaud's Email Resource Center.

## Apple Pay for Blackbaud Checkout

Apple Pay is now available to donors as a secure checkout option for ***Blackbaud Merchant Services*** (BBMS) customers in the United States and Canada.

Previously, this method of payment was only available for organizations in the Apple Pay Early Adopter Program (EAP); now it is Generally Available.

With the Donation Form - Mini part, you can now accept payments through Apple Pay when you use ***Blackbaud Merchant Services*** (BBMS to process one-time credit card donations. This new payment option enables your constituents on Apple devices to make donations without having to enter as much information on the donation form, because data such as their credit card number and billing address are already stored in their Apple Pay wallet.

***Note:*** Refer to Apple's Terms and Conditions in the Blackbaud Checkout FAQs.

# Additional Blackbaud Checkout Enhancements

This release expands enhancements that were introduced in service pack 19.

## Customize Page Theme

Previously, we announced that organizations can customize the theme on the Blackbaud Checkout page. This benefits administrators of organizations with branding guidelines who want to change the

font and colors on the Blackbaud Checkout page to match your organization's brand. You can also specify a theme to use site-wide and override the site-wide theme on individual forms. For more information refer to Blackbaud Checkout Enhancements.

With this release, the **Use site defaults for Blackbaud Checkout Theme** option now appears whenever you edit

- an Event Registration part
- Mini Donation Form (see Enhancements to the Donation Form - Mini Part on page 129 )
- an Advanced Donation Form
- a Payment 2.0 part

and select a merchant account that supports Blackbaud Checkout. The option is selected by default, but you can override it.

If you don't want to use the default theme, clear the **Use site defaults for Blackbaud Checkout theme** option. Then enter values for the **Primary color** and **Secondary color** and select a different font.

## Checkout Page — Separate First Name and Last Name Fields

Likewise, when you edit event registration forms, advanced donation forms, or any Blackbaud Internet Solutions page using Payment 2.0, ***Blackbaud Internet Solutions*** now uses separate **First Name** and **Last Name** fields. Previously, these forms used a single Cardholder Name field for Blackbaud Checkout.

## Checkout Page — Customize Page Theme and Digital Wallets

Additionally, under **Digital Wallets**, you can choose which forms of payment — Visa Checkout, MasterPass, or Apple Pay— are accepted during checkout for event registration forms, advanced donation forms, or any ***Blackbaud Internet Solutions*** page using Payment 2.0. By default, all payment methods are selected.

***Note:*** Digital wallets are only available for ***Blackbaud Merchant Services*** customers.