

# Alumni/Development Release Bulletin

August 2015

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## About Release 92\_9 Alumni/Development Features

Release 92\_9 for Advantage Alumni/Development introduces several major enhancements, including a totally new Gift Search tool. Please review the topics in this bulletin for more details.

Please contact <u>Support@senior-systems.com</u> if you have any questions about any of these new features.

# Alumni/Development Enhancements

**Captcha added for unregistered (public) giving screens** - Captcha has been added to unregistered Online Pledge and Online Donation screens in My BackPack. Captcha prevents unauthorized hacking programs from gaining access to accounts by ensuring that a human is entering the information. The **Enable Captcha check?** system preference in System Administration must be enabled for Captcha to appear on the unregistered Online Pledge and Online Donation screens. Note that this page will only appear on unregistered giving pages. Registered giving pages require My BackPack credentials to log in.

yster	n Preferences			
Арр	Description		Value	No blan
SU	Hide Home and Logout button in MBP.	N		RATHIN
	Enable check for existing user account for new MBP users?	Y		SPA 14
	Require that new MBP users have a unique email address (only applies if check is enabled, above).	Y		Refresh
SU	Enable Captoha check?	Y <		Enter Captcha code below:
SU	Enable check for existing user account for new MBP users?	Y		

### Gift Search Tool

A totally new Gift Search tool has been added to the Alumni Development application to help you easily edit, view, search and export Gift records. This new tool has been added to the **Main-tenance** menu, the **View** menu, and as a **Quick link** icon.

鶲 Advantage Al	lumni/Developr	ment					
Maintenance	View Giving	Reports	Mailings Exp				
SR Constituents	🧟 Gift Posting	🦻 Gifts	Export				
Online Forms awai	ting approval.						
	Online Forms awaiting approval.						

The new Gift Search screen displays a list of Gift Types which you can filter, or you can create your own Constituent or Gift query as necessary.

Query List Select Const Select Gifts t	tituents to displa		oort 👻 🎾 D	• •	Additio Lost / [ Display		
Options Soft Credits Type Date Range Filter Results	(All)	To		ven Pledges Only slude Matching Credits	Disp Disp	olay Inactive Constituents	
	Control		Degins w	Refresh List			
		GiftTupe			I.D.	Campaign	Fund Nam 🔺
Туре	Date 🔺	Gift Type	Amount	Refresh List	I.D.	Campaign	Fund Narr 🔺
Type	Date 🔺		Amount	Refresh List Name Carol Jones			
Type P 05 P 07	Date  Date	edge	Amount 12,000.00	Refresh List Name Carol Jones Paul Rodgers	000013	Development	Imagine CC Phase 1
Type P 05 P 07 P 07	Date A 5-16-2001 Ple 7-23-2001 Ple 7-24-2001 Pa	edge edge	Amount 12,000.00 5,100.00	Refresh List Name Carol Jones Paul Rodgers Samantha Barr	000013 000102	Development Development	Imagine CC Phase 1 Imagine CC Phase 1
Type P 05 P 07 P 07 P 07 P 07	Date         Ple           5-16-2001         Ple           7-23-2001         Ple           7-24-2001         Pa           3-22-2001         Pa	edge edge syment	Amount 12,000.00 5,100.00 0.00	Refresh List Name Carol Jones Paul Rodgers Samantha Barr Henry Wells	000013 000102 000102	Development Development Development	Imagine CC Phase 1 Imagine CC Phase 1 Imagine CC Phase 1
Type P 05 P 07 P 07 P 07 P 08 P 08	Date         Ple           5-16-2001         Ple           7-23-2001         Ple           7-24-2001         Pa           3-22-2001         Pa           3-11-2001         Ple	edge edge syment	Amount 12,000.00 5,100.00 0.00 0.00	Refresh List Name Carol Jones Paul Rodgers Samantha Barr Henry Wells Carol Hicks	000013 000102 000102 000103	Development Development Development Development	Imagine CC Phase 1 Imagine CC Phase 1 Imagine CC Phase 1 Imagine CC Phase 1 Imagine CC Phase 1
Type P 05 P 07 P 07 P 08 P 08 P 05 P 10	Date         Pile           5-16-2001         Pile           7-23-2001         Pile           7-24-2001         Pia           3-22-2001         Pia           3-11-2001         Pik           0-01-2001         Pik	edge edge avment avment edge	Amount 12,000.00 5,100.00 0.00 0.00 500.00 500.00	Refresh List Name Carol Jones Paul Rodgers Samantha Barr Henry Wells Carol Hicks	000013 000102 000102 000013 000230	Development Development Development Development Development Development	Imagine CC Phase 1 Imagine CC Phase 1

As with other search screens, you click the **Options** drop-down and select **Modify Options**. The Settings window appears. On the Settings window, you can organize the Gift display grid on the **Table Columns** tab or select grid settings on the **Screen Settings** tab.

Double-click a Gift in the grid, or highlight a gift and click **Edit**, to view the gift.

Gift Date Amount	Fiscal Year 10-17-2001 2002	Fiscal Month October 👻	Details Appeal Gift Attribute	Annual Fund Fall Letter (2014) Math Building Construction	<ul> <li>Designatio</li> <li>NPV Amt.</li> </ul>		<b>-</b>
Fund	6 Imagine CC Phase 1	<u> </u>	Solicitor Thank You Letter Letter 1	ers	illiam Horhay	Print Date	
Constituency	C Anonymous Gift / Pledge	•	Letter 2	Grandparent Thank You Athletic Gift Thank you for your gift	•	Print Date	05-21-2015 05-21-2015
Payment Method	Check	•	Receipt / Ackno Receipt Type		•	Receipt Date	05-21-2015
Date Exp. Date	05-21-2015 Ref. No. 05/16 Bank No	32342355555444 885645453	Receipt Amount Personal Note Media	300.00 Thank you for your gift			
Online Giving	g Code 456465346557456		Media		٩		

Access to the gift search tool relies on a new set of security keys under the Maintenance and View trees. Add these keys to any user(s) or group(s) in order to give users access to the new gift search tool.



**Enhanced Gift Report** - The **Gift Attribute** field and the **Total Giving Count** tally at the end of the report have been added to the Gift Report in Alumni Development. This report is located in **Reports** > **Giving Detail Reports** > **Gift Report**.

Report View (Gift Report)								
File View Print Tools								
			Gift Rej	port				Ĺ
July 6, 2015 1:40 I	PM		Westberry	Hollo	W			Page: 1
		All	Constituents All Gifts So	rted by Na	me, Gift Date	•		
CONSTITUENT NAME	Constituency	Campaign	Fund	Date	Туре	Sub Typ	Gift Attribute	All Giving Match
Ms. Dawn Abbott Class Yr : 1988 test@test.com; test2@test.c	com; tes3t@test.com; Alumni	Development	Annual Fund - Golf	05/28/15	Gift		Annual Fund 13-14	50.00
Mr. John Brown 11 Yellow St. Westmount, MS 33220 Class Yr 2006 555-666-7777 test@test.com Mrs. Alex Barnes	Alumni Alumni	Development Development	Annual Fund - Baseball Annual Fund - Weight Ro	03/11/15 03/11/15			Annual Fund 13-14	10.00 0.00
23 East St. Charlestown, MD 44550 Class Yr : 2004 666-777-9999	Employee	Development	Annual Fund	08/13/14	Payment		Annual Fund 13-14	24.00

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🗐 Report View (Gift Report)				_	
File View Print Tools					
🗟 🍛 - 🚺 🜒 🕨 🗎					
	Gi	ft Report			
July 6, 2015 1:55 PM	Westb	erry Hollow		Page: 41	
	All Constituents All	Gifts Sorted by Name, Gift Dat	te		
CONSTITUENT NAME Constituency	Campaign Fund	Date Type	Sub Type Gift Attribute	All Giving Match	
Parent	Development Annual Fund	10/28/14 Gift		1,500.00	
Total Giving Count: 227	Min -100.00	Max 12,000.00	Avg 525.01	119,178.26	-

**Updated Default Addressee and Salutations in Alumni Development** - The default Addressee and Salutation types have been updated in the Alumni Development **Administration Maintenance** > **Address/Salutation** tab.

eral <u>A</u> ddress/Salutati dressee / Salutation Fo		ers <u>C</u> ust	om   <u>P</u> osting Options   Screen Style   Preference	15
Name Forma	at		Example	A Ne
Const Sal 2		James		
Shared Const M. Sali	2	James a	nd Susan	E
Const-Spouse 3		James a	nd Susan Smith	Del
Other Formal		James M	1. Smith, Jr. and Susan B. Paula, MD	
Const Sal 3		James S		Cons
Const Pref 1		Jim		
Salutations			Constituent: (Male)	
Salutations				
Salutations Addressee	Mr. Ja	imes M. S	Constituent: (Female) Constituent: (Female Single)	
Addressee Salutation 1	Mr. Ja Mr. Si	imes M. S nith	Constituent: (Female) Constituent: (Female Single) Spouse: (Male)	
Addressee Salutation 1 Salutation 2	Mr. Ja Mr. Si Jim	mes M. S nith	Constituent: (Female) Constituent: (Female Single) Spouse: (Male) Spouse: (Female) Alumni Constituent: (Male)	
Addressee Salutation 1	Mr. Sr	imes M. S nith	Constituent: (Female) Constituent: (Female Single) Spouse: (Male) Spouse: (Female) Alumni Constituent: (Male) Alumni Constituent: (Female)	
Addressee Salutation 1 Salutation 2	Mr. Sı Jim	mes M. S nith	Constituent; (Female) Constituent; (Female Single) Spouse; (Male) Spouse; (Female) Alumni Constituent; (Male) Alumni Sonstituent; (Female)	
Addressee Salutation 1 Salutation 2	Mr. Sı Jim	nith	Constituent; (Female) Constituent; (Female Single) Spouse; (Male) Alumni Constituent; (Male) Alumni Constituent; (Female) Alumni Spouse; (Male) Alumni Spouse; (Male) Alumni Spouse; (Female)	
Addressee Salutation 1 Salutation 2	Mr. Sı Jim	mes M. S nith	Constituent: [Female] Constituent: [Female Single] Spouse: [Female] Alumni Constituent: [Female] Alumni Sonstituent: [Female] Alumni Spouse: (Female] Alumni Spouse: [Female] Alumni (Mariied) Shared Constituent: [Male]	
Addressee Salutation 1 Salutation 2	Mr. Sı Jim	mes M. S nith	Constituent; (Female) Constituent; (Female Single) Spouse; (Male) Alumni Constituent; (Male) Alumni Constituent; (Female) Alumni Spouse; (Male) Alumni Spouse; (Male) Alumni Spouse; (Female)	
Addressee Salutation 1 Salutation 2	Mr. Sı Jim	imes M. S nith	Constituent; [Female] Constituent; [Female] Spouse; [Female] Alumni Constituent; [Male] Alumni Constituent; [Male] Alumni Spouse; [Male] Alumni Spouse; [Male] Alumni Spouse; [Female] Alumni Marined] Shared Constituent; [Female] Shared Constituent; [Female] Shared Constituent; [Female] Shared Constituent; [Spouse is Deceased]	
Addressee Salutation 1 Salutation 2	Mr. Sı Jim	imes M. S mith	Constituent: [Female] Constituent: [Female] Spouse: [Male] Spouse: [Female] Alumni Constituent: [Female] Alumni Spouse: [Male] Alumni Spouse: [Male] Alumni Spouse: [Male] Shared Constituent: [Male] Shared Constituent: [Male] Shared Constituent: [Male] Shared Constituent: [Spouse is Deceased] Shared Constituent: [Spouse is Deceased] Shared Constituent: [Spouse is Deceased]	
Addressee Salutation 1 Salutation 2	Mr. Sı Jim	imes M. S mith	Constituent: [Female] Constituent: [Female] Spouse: [Male] Spouse: [Female] Alumni Constituent: [Male] Alumni Spouse: [Male] Alumni Spouse: [Male] Alumni Spouse: [Male] Alumni Maried] Shared Constituent: [Male] Shared Constituent: [Fimale] Shared Constituent: [Fimale] Shared Constituent: [Fimale] Shared Constituent: [Fimale] Shared Constituent: [Fimale] Shared Constituent: [Spouse is Deceased] Shared Constituent: [Simare Tale] Shared Constituent: [Simare Tale] Shared Constituent: [Simare Tale]	
Addressee Salutation 1 Salutation 2	Mr. Sı Jim	imes M. S mith	Constituent: [Female] Constituent: [Female] Spouse: [Maie] Spouse: [Maie] Alumni Constituent: [Female] Alumni Spouse: [Maie] Alumni Spouse: [Maie] Alumni Spouse: [Female] Alumni Marineid] Shared Constituent: [Female] Shared Constituent: [Female] Shared Constituent: [Female] Shared Constituent: [Souse is Deceased] Shared Aremale: [Different Last Names]	
Addressee Salutation 1 Salutation 2	Mr. Sı Jim	imes M. S mith	Constituent: [Female] Constituent: [Female] Spouse: [Male] Spouse: [Female] Alumni Constituent: [Male] Alumni Spouse: [Male] Alumni Spouse: [Male] Alumni Spouse: [Male] Alumni Maried] Shared Constituent: [Male] Shared Constituent: [Fimale] Shared Constituent: [Fimale] Shared Constituent: [Fimale] Shared Constituent: [Fimale] Shared Constituent: [Fimale] Shared Constituent: [Spouse is Deceased] Shared Constituent: [Simare Tale] Shared Constituent: [Simare Tale] Shared Constituent: [Simare Tale]	

# Online Giving

Online Giving has been significantly enhanced to allow many more options and customizations for your online giving pages. Here are the major new features:

- **Multiple giving pages** You can build an unlimited number of online giving pages for both My BackPack users (prompting constituents for their credentials) or the general public (pages that do not require My BackPack credentials).
- **Show/hide fields** You can choose to show and hide some of the fields on your online giving form.
- More customization options You now have even more areas to enter custom text, images, links, and more!

#### <u>Setup</u>

The Online Giving Setup page has changed significantly to offer new tools and features.

- 1. **Public Pages, Registered Donor Pages** Toggle between tabs to see lists of your pages. Upon database update, there will be one page for each type (your existing Registered and Unregistered pages). You can add any number of pages, customized for certain campaigns, events, funds, or anything else.
- Select Primary Link Use this button to control which is the "primary" online donation page, for each type.
   For "Public" pages Primary acts as the default page users arrive at in cases where they use an old or inactive link (they are automatically brought to the Primary page).
   For Registered Donor Pages Similarly, if users try to access an old or inactive link, they will arrive at the page designated as Primary. Additionally, the Primary page is the page your users will reach by clicking the donation link in the My BackPack navigation menu.
- 3. **Pages** This grid lists all of the pages you have built. You can see the page name, description, and link and you can copy/paste that link to make it available elsewhere (embedded in an email or web page, for example).
- 4. **Primary & Active Checkboxes** These checkboxes show you page status at a glance.
- 5. **New** Click to add a new page.
- 6. **Preview, Edit, Copy, & Delete** Use these buttons to work on existing pages.

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	nline Gi	ving Setup			
Public	Pages	Registered Done	or Pages		
			splay custom content to your constituents. Each page h on the onine giving form, and HTML formatted context.	ave custom options, including whether it is public or accessible through a	a My Backpack login,
	Deles and L				
	Primary Li	nk Page Name ¢	Description •	Link +	Action
	-		Description +	Link •	Action
	-	Page Name 🛊	Description +		

#### New Giving Page

When you build a new giving page or modify an existing page, you have three areas of customization:

- Settings
- Field Options
- Custom Text

#### <u>Settings</u>

On the **Settings** tab, you can set the **Active**, **Public** or **Primary** checkboxes.

- 1. Active Note that in order for the page to be available, it must be marked as Active.
- 2. **Public** Check this option to make this URL available to the public. This means that constituents will not log in with their My BackPack credentials to make a gift.
- 3. **Primary** Check this option to make this page the Primary giving page. There are two primary giving pages, one Public and one Registered. In order to mark a page as Primary, it must be Active.
- 4. **Title** The text you enter here will appear as the page title.
- 5. **Description** This is an internal-only description. It will NOT appear to your users. You can use this field to describe your page.
- 6. **URL** When you build your page, the URL to reach the page will be listed in this field. This is a read-only field. You can copy/paste the URL from this field into emails or other pages as needed.
- 7. **URL Customization** You can customize the URL of the page to make it "friendly" and reflect the nature of your campaign effort. Please note that special characters and spaces cannot be used here. By default, this field will pre-fill with your page title.
- 8. **Created and Last Updated** These read-only fields track when the page is created and modified.
- 9. **Campaigns** You can choose to show or hide a dropdown for users to select where their gifts should be used. If you choose to show Campaigns, you can select which Campaigns are available (or you can allow all campaigns to appear).

- 10. The settings for Registered Donor Pages are similar to the options for creating new Public Pages, with the exception of being able to select Appeals, in addition to Campaigns.
- 11. Save, Cancel Click to save your changes, or return to the Setup page without saving.

	Online Giving Setup: New Page
	ack to Online Giving Setup
ſ	Settings Field Options Custom Text
	Page Settings
	Active? 4 Title:
3	Public? 2     Description (internal only):     Primary?     6     URL:
	URL Customization: 7
	Created: By: MBP
	Last updated: By: MBP
	Sift Options
	Campaigns Optionally, provide choices for constituents who want their gift to go towards a certain campaign. You can select certain campaigns to will appear on the giving form, or allow constituents to pick from all campaigns.
9	Show campaigns
	O not show campaigns
	Cancel
	ach to Online Giving Setup Land average and a stand a
	ift Options
	Campaigns Optionality provide choices for constituents who want their gift to go towards a certain campaign.You can select certain campaigns to will appear on the giving form, or allow constituents to pick from all campaigns.  Show campaigns Select Campaign Select Campa
10	Appeals Optionally, provide choices for constituents who want their gift to go towards a certain appeal.You can optionally select certain appeals to will appear on the giving form, or allow constituents to pick from all appeals.  Show appeals Select Appeal Select Appeal
	ave Cancel

#### Field Options

Use the **Field Options** tab to control what your online constituents will see on their giving form.

- Show This option controls whether or not this particular field is shown on the giving form. You can choose to hide extraneous or unnecessary fields. You will notice that if you want to mark a field as "Required", it must be visible on the form. You will also notice that some fields used to collect critical information are required by the system, and cannot be hidden.
- 2. Required You can mark fields as "Required". You will notice that some fields are required by the system.
- 3. Field Label The name of the field as it appears by default is listed here.

- 4. Custom Label Use this field to customize the field label as it appears on the giving form.
- 5. Default Value Use this field to pre-fill the form with a default value (for example, if most of your constituents are local you may want to pre-fill the State field).
- 6. Save, Cancel Click to save your changes, or return to the Setup page without saving.

	-Hinne Field		T4		
s	ettings Field	Options Custo	m Text		
0	Giving Details				
	Show?	Required?	Field Label	Custom Label	Default Value
			Title 4		
			Suffix	5	
	☑ 2	V	First Name		
		V	LastName		
			Maiden Name		
	<b>V</b>	☑ 3	Address		
			Address 2		
	<b>V</b>	V	City		

#### **Custom Text**

Your giving pages give you new areas for entering custom text, images, links, and more, throughout the giving form.

ample	
Header	
Title 👻	
Suttix -	
* First Name	
* Last Name	
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~
Campaign Development +	
· Fund Annual Fund -	
* Amount	
Make my donation anonymous	ALCONT LINK
Make my donation anonymous () Learn more about piking My gift is in Honorthemory of	-ADDVI LINK
In Honor at:	
in Memory at:	
Additional info	
	-
Matching Info	
Matched by	
Address	
City	
~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~~	
Paying By Credit Card.	
Paying By Credit Card	
Paying By eCheck: 🦟	
Paying Dy eCheck	
Footer	

Use the Custom Text tab to add these areas as needed.

- 1. View Sample Layout Click to view where each custom text area appears on your form.
- 2. Active You can mark sections of text as active/inactive as needed.

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- 3. **Section** The sections available are Header, About, Matching Information, Additional Information, and Footer. You can use all, some, or none of these sections.
- 4. **Action** Click to edit each section. Editing the section leads you to a WYSIWYG editor, where you can enter and format text, images, links, and more.
- 5. Save, Cancel Click to save your changes, or return to the Setup page without saving.

Eac	Back to Chline Giving Setup: New Page			
s	Settings Field Options Custom Text			
Ado	Add or edit a block of custom text below.			
1 Uns	Unsure of where your text will appear? View Sample Layout			
	Active?	Section	Action	
2	]	Header	Ø	
		About	9	
	3	Matching Information	8	
		Additional Information 4	9	
	]	Footer	8	
Sav	Save Cancel			
Baci	Back to Online Giving Satur			