



Alumni/Development Release Bulletin August 2015

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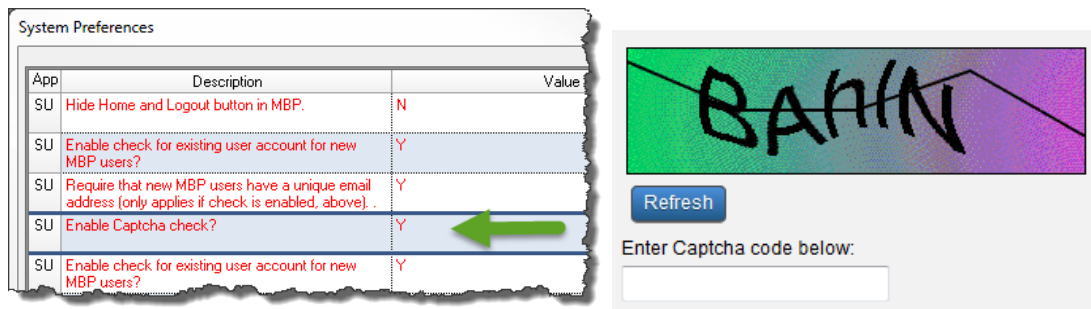
About Release 92_9 Alumni/Development Features

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 Support@senior-systems.com if you have any questions about any of these new features.

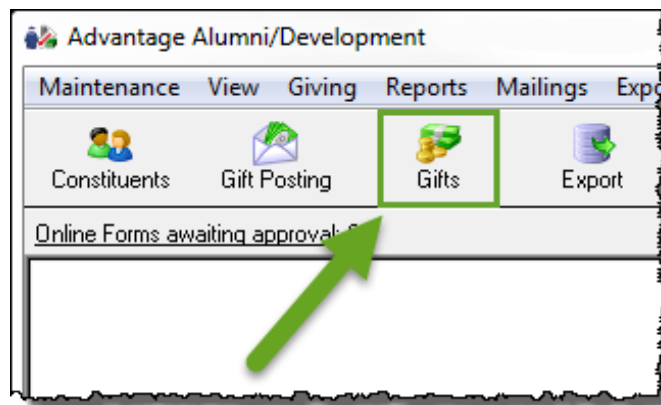
Alumni/Development Enhancements

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.

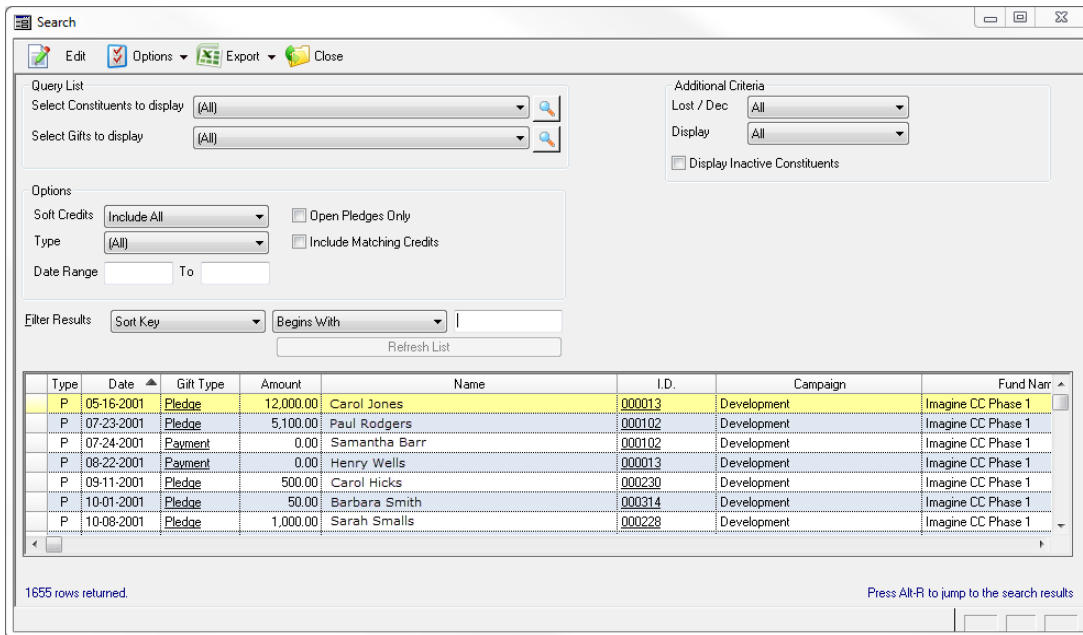


Gift Search Tool

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 **Maintenance** menu, the **View** menu, and as a **Quick link** icon.

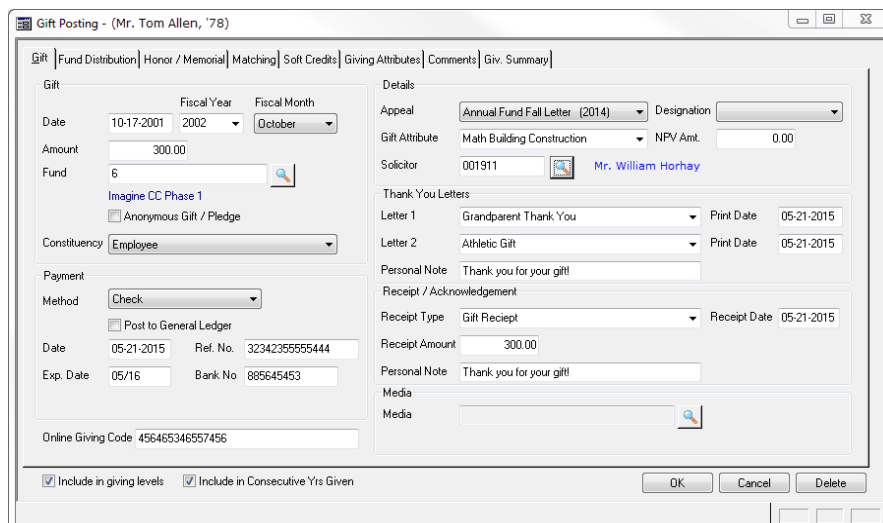


The new Gift Search screen displays a list of Gift Types which you can filter, or you can create your own Constituent or Gift query as necessary.

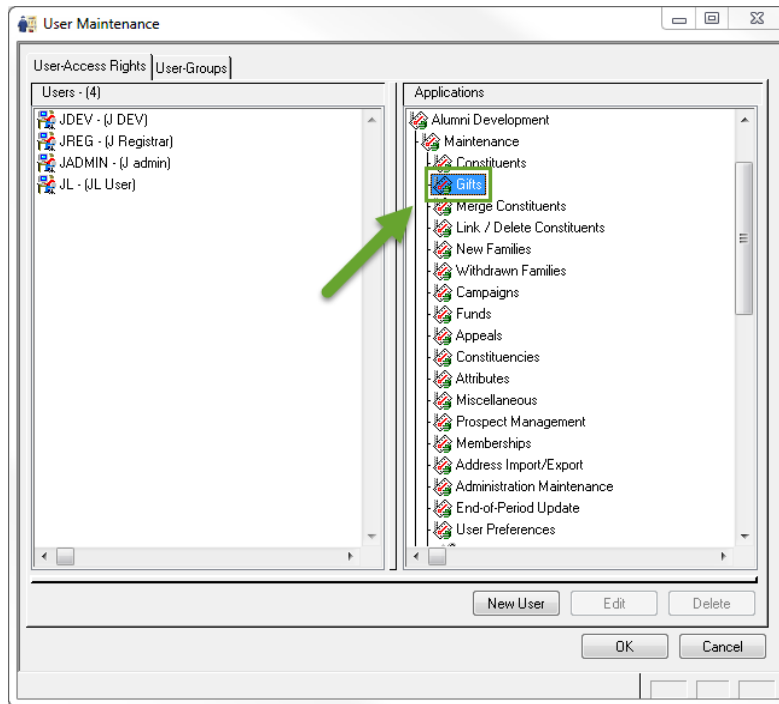


As with other search screens, you click the **Options** drop-down and select **Modify Options**. The Settings window appears. On the Settings window, you can organize the Gift display grid on the **Table Columns** tab or select grid settings on the **Screen Settings** tab.

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



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**.

The screenshot shows the 'Report View (Gift Report)' window. The report title is 'Gift Report' for 'Westberry Hollow' on July 6, 2015, at 1:40 PM. The report is sorted by Name and Gift Date. The table below shows the gift transactions with the 'Gift Attribute' column highlighted in green.

CONSTITUENT NAME	Constituency	Campaign	Fund	Date	Type	Sub Typ	Gift Attribute	All Giving Match
Ms. Dawn Abbott Class Yr : 1988 test@test.com; test2@test.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	Alumni Alumni	Development Development	Annual Fund - Baseball Annual Fund - Weight Ro	03/11/15	Gift Pledge		Annual Fund 13-14	10.00 0.00
Mrs. Alex Barnes 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

Report View (Gift Report)

File View Print Tools

July 6, 2015 1:55 PM

Gift Report
Westberry Hollow

Page: 41

All Constituents All Gifts Sorted by Name, Gift Date

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	Arg 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.

Alumni/Development Administration

Edit

General Address/Salutation Letters Custom Posting Options Screen Style Preferences

Addressee / Salutation Formats

Name Format	Example
Const Sal 2	James
Shared Const M. Sal2	James and Susan
Const-Spouse 3	James and Susan Smith
Other Formal	James M. Smith, Jr. and Susan B. Paula, MD
Const Sal 3	James Smith
Const Pref 1	Jim

Default Formats

Salutations	Categories
Addressee	Mr. James M. S
Salutation 1	Mr. Smith
Salutation 2	Jim
Salutation 3	Jim

- Constituent: (Male)
- Constituent: (Female)
- Constituent: (Female Single)
- Spouse: (Male)
- Spouse: (Female)
- Alumni Constituent: (Male)
- Alumni Constituent: (Female)
- Alumni Spouse: (Male)
- Alumni Spouse: (Female)
- Alumni (Married)
- Shared Constituent: (Male)
- Shared Constituent: (Female)
- Shared Constituent: (Primary is Deceased)
- Shared Constituent: (Spouse is Deceased)
- Shared Constituent: (Same Title)
- Shared Male: (Different Last Names)
- Shared Female: (Different Last Names)
- Other
- Other (Different Last Names)
- Work Addresses (Constituent)
- Work Addresses (Spouse)

Online Giving

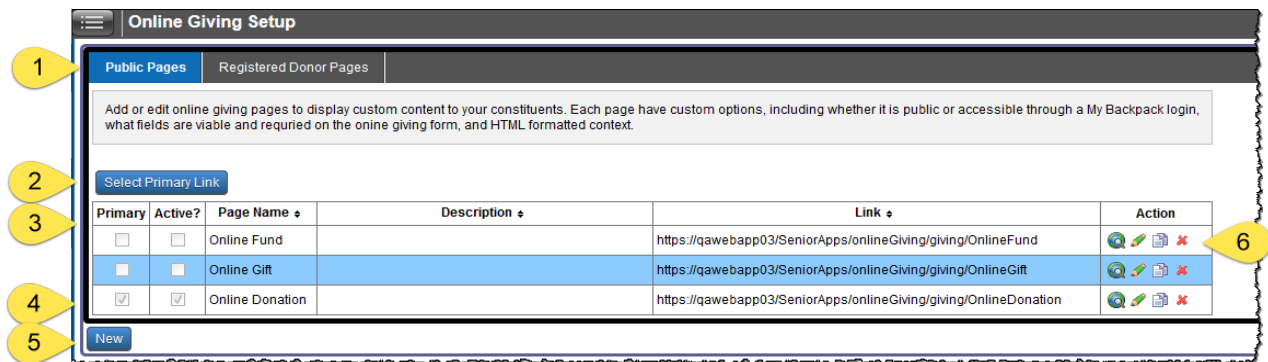
Online Giving has been significantly enhanced to allow many more options and customizations for your online giving pages. Here are the major new features:

- **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!

Setup

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.
2. **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.



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

Settings

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

[Back to Online Giving Setup](#)

Settings | Field Options | Custom Text

Page Settings

Active? Public? Primary?

Title: _____

Description (internal only): _____

URL: _____

URL Customization: _____

Created: _____ By: MBP

Last updated: _____ By: MBP

Gift 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.

Show campaigns Do not show campaigns

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Gift 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.

Show campaigns Do not show campaigns

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 Do not show appeals

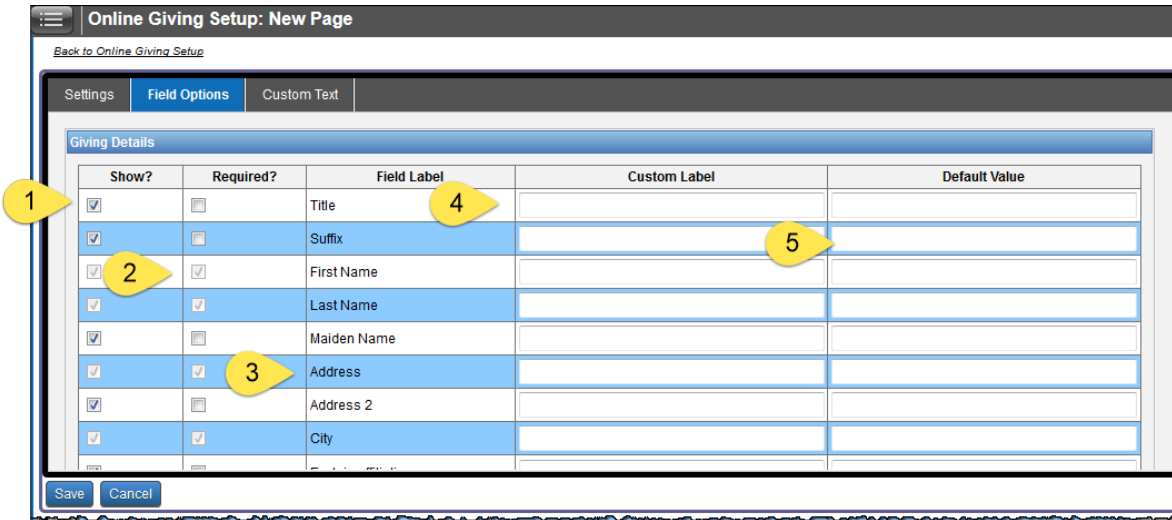
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Field Options

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

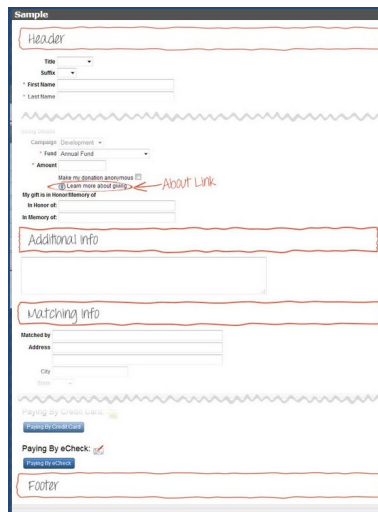
1. Show - This option controls whether or not this particular field is shown on the giving form. You can choose to hide extraneous or unnecessary fields. You will notice that if you want to mark a field as "Required", it must be visible on the form. You will also notice that some fields used to collect 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.



Custom Text

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



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.

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.

