

Altru™ for Beginners

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1/9/18

Altru

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CHAPTER 1

Introduction

"The secret of getting ahead is getting started."

– Mark Twain

This Chapter...

- ▶ *Programs, Fundraisers, and Finances — Oh My!*
- ▶ *Book Navigation*
- ▶ *Program Navigation*
- ▶ *Set Up Your Workspace*
- ▶ *Just Browsing: Cloudy Days Ahead*

Welcome to *Altru for Beginners*! *Altru* is a powerful tool that enables your organization to manage its ticketing, fundraising, and finances in one place. In doing so, it allows you to view all aspects of your supporters and manage the flow of purchases and donations from your cash registers to your bank accounts. However, don't let that thought overwhelm you. Unless you have a system administration role (we'll talk about roles in a bit), your day-to-day experience is only a taste of what all *Altru* can do. *Altru* displays only the tasks you need to complete your job, even if you "wear multiple hats" at your organization. Regardless of which hat you wear and how you use the program, *Altru* uses everything you enter into the program, along with everything your fellow co-workers enter, to support your mission. That's where this book comes in, to explain the features and their interactions that may not be so obvious.

The purpose of *Altru* is to make your work faster and easier so you can devote more time to the business of running an arts and cultural organization. If you're willing to devote some time to learning how to use this program, you can reap some serious rewards. And we're here to help. This book is all about you.

Programs, Fundraisers, and Finances — Oh My!

Before we begin to talk too much about *Altru*, let's talk about YOU. If you're using *Altru*, you're involved with the ticketing, fundraising, and/or finances at your arts and cultural organization in some way. As an arts and cultural organization, setting up programs and events and selling tickets and merchandise related to these programs are a large part of educating your patrons. Additionally, you may offer membership programs to encourage patron involvement and retain their support.

Of course, your organization can't live on sales orders and membership fees alone. A large part of your success relies on donations and contributions received to help fund your mission and endeavors. Of course, fundraising is far more complicated than just asking people to donate to your organization. To really succeed, you have to know a lot about your potential donors, including their history with your organization and their interests, potential giving, and personal motivations.

This is a lot of information to keep up about one person, much less about an entire database full of supporters, or constituents, be they donors, patrons, support staff, or otherwise. Between the sales orders and donations, that's also a lot of money to account for and verify is used correctly. That's where *Altru* comes in, as a tool you can use to maintain information about your supporters and the revenue they provide. *Altru* also enables you to maintain your program events, fundraising efforts, and communication efforts (not to mention manage fundraising events, volunteers, and much, much more).

Book Navigation

You can read it straight through or just go directly to the sections you need. This book provides the basic information you need to learn the general concepts and features of *Altru* or to gain a foothold before you move on to more complicated features.

Chapters and Organization

This guide is broken into several digestible, yet informative, chapters:

Introduction. In this chapter that you're reading right now, you'll learn about the general features of *Altru*, including system roles and web forms. You'll also learn how to navigate through *Altru* and personalize your Home Page and display settings.

Constituents. In this chapter, you'll learn about how to add and manage information about your supporters, referred to as "constituents" in *Altru*. You'll also learn about ways to recognize your constituents' contributions and manage the constituents who volunteer at your organization.

Tickets/Programming. In this chapter, you'll learn about configuration tasks you'll need to complete before you can build your programs and sell tickets. These include prices, sales methods, delivery methods, resources, discounts, and printing. You'll also learn about adding programs and scheduling program events.

Merchandise. In this chapter, you'll learn about how to manage your merchandise. You'll also learn about merchandise departments and categories, vendors, and reports.

Treasury. In this chapter, you'll learn the basics of setting up *Treasury* in order to deposit and post payments.

Fundraising. In this chapter, you'll learn about the various types of fundraising designations. You'll also learn about using solicitations (also known as "appeals"), appeal mailings, and tools such as benefits to enhance your efforts.

Memberships. In this chapter, you'll learn about key membership concepts, including the five components used to build your core membership offering in *Altru*. You'll also learn about fundraising membership programs, promotions, renewal notices, membership card printing, and much more.

Events. In this chapter, you'll learn about how to plan and manage your "special" events held outside of programs and ticketing for fundraising, stewardship, and marketing efforts.

Sales. In this chapter, you'll learn about two different sales screens, your sales reports, and daily tasks such as counting your initial cash and reconciling sales.

Group Sales and Facility Rentals. In this chapter, you'll learn about group sales and facility rentals. We'll discuss key concepts and processes around reservations, group itineraries, contract preparation, and payment processing. Additionally, we'll discuss security deposits and how to check groups in and out.

Revenue. In this chapter, you'll learn about revenue transactions. In *Altru*, "revenue" refers to payments and commitments of future payments such as pledges, matching gift claims, and recurring gift promises. In addition to monetary transactions, revenue can include contributions of stock, property, and services as gifts-in-kind. You learn about payments and the applications of this revenue. You can also set up processes for credit card and direct debit transactions and to communicate with constituents about revenue through acknowledgements and reminders.

Data Management. In this chapter, you'll learn about tasks associated with data management through batch entry, creating queries, and importing and exporting data.

Reports and KPIs. In this chapter, you'll learn about reports and key performance indicators (KPIs), which you can use to analyze data and track your organization's effectiveness.

Web Forms. In this chapter you'll learn about all aspects of web forms, from designing the appearance of web pages and configuring a shopping cart, to creating web forms and designing acknowledgement messages.

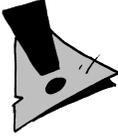
Outroduction. In this chapter, you'll recap some of the information and terminology covered in this book. (Don't skip ahead... Like any good novel, it's not the conclusion and resolution but the details along the way.) You'll also learn about additional resources available to you for detailed information about how to perform tasks (or if you're just itching to jump into a sequel).

You can read the chapters that apply directly to your role, but we recommend you read all the chapters to better understand the big picture of *Altru* and how your efforts impact the work of others at your organization (and vice versa).

Icons and Conventions

To help you navigate through this book, we highlight important information such as energy-saving tips or more technical detail. These conventions provide a consistent format so you can focus on the information and get up and running with *Altru* as quickly as possible. Just look for these icons as you read the book:

	The Which Hat Do You Wear? section at the start of each chapter explains which system roles are most likely to work with the features explained in the chapter.
	The Backtrack section at the end of each chapter provides a recap of the concepts and features discussed in the chapter.
	The light bulb indicates a note or tip about how you can use <i>Altru</i> to save time and energy.
	The finger-and-string indicates an item to keep in mind as you use <i>Altru</i> .

	<p>The exclamation point indicates a caution, with information about something to avoid to prevent downfalls such as data loss.</p>
	<p>The geek indicates more technical detail information about how things work within <i>Altru</i>.</p>

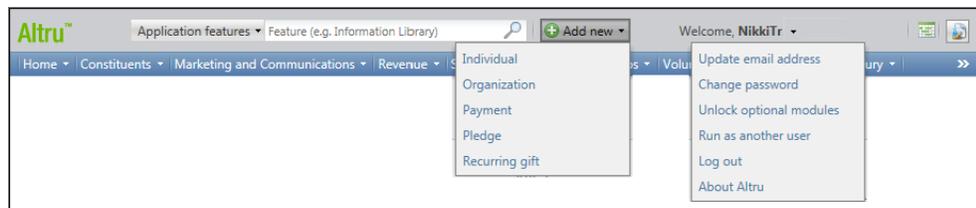
Program Navigation

Now that we've discussed how to use this book, let's get to the basics of *Altru*.

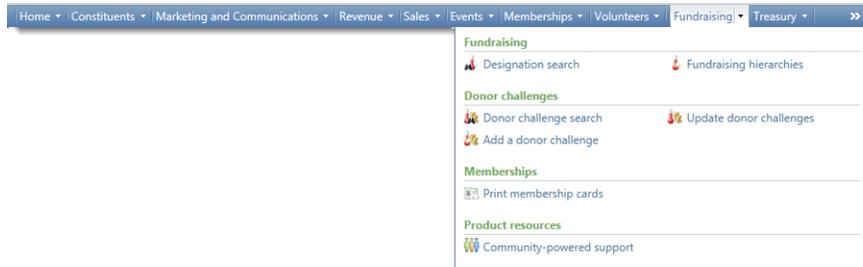
Page Elements

To help you navigate through *Altru*, several consistent elements help organize and provide access to the tasks required to do your job.

Menu bar. At the top of your screen, you'll find the menu bar. From the menu bar, you can perform tasks, search for a feature or record, add new constituents or revenue transactions, or access the organization calendar.



Navigation bar. Below the menu bar is the navigation bar. From the navigation bar, you can access features and tasks by functional area.

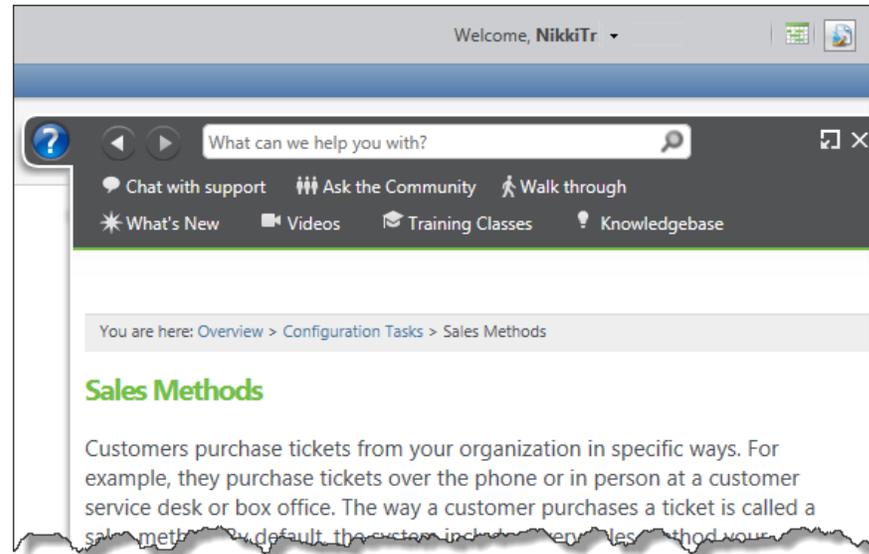


Did You Know?

To navigate backward or forward through your page history in *Altru*, use the **Back** or **Forward** buttons of your browser.

Explorer bar. On the left of the screen is the explorer bar. From the explorer bar, you can access recently opened records and recently performed searches. From some pages, you can also access related tasks. Pro tip: You can add shortcuts in the explorer bar to frequently used pages, tasks, and records.

Help panel. Click the **Help** button to launch a panel of resources to learn more about *Altru* features. You can search for help topics and Knowledgebase solutions, watch videos, and sign up for training. You can also post your question to the *Altru* community or chat with Support.



System Roles: That Thing You Do

Odds are that not everyone at your organization does the same job you do. Maybe you specialize in specific types of information or tasks, while that guy across the building works with something else. Similarly, when you work in *Altru*, the tasks and forms you see may differ from the person at the next computer or that same guy across the building. That's because *Altru* shows you only the items you require to perform your job, based on the system roles assigned to you as a user in the program. We won't go into too much depth on system roles, as only a few people at your organization should have to worry about managing them. However, if you think you should be able to work with more of what *Altru* has to offer, ask the system role administrator at your organization to hook you up!

Even if the features described in a chapter do not directly apply to your system role, we recommend you read the chapter all the same. While your system role might allow you to work within a specific area of the program, it's important to understand how other areas of the program work with your area (and vice versa). While you might only see a portion of what *Altru* can do, it's always valuable to understand the big picture and how you and your activity in the database contribute to your organization's success.

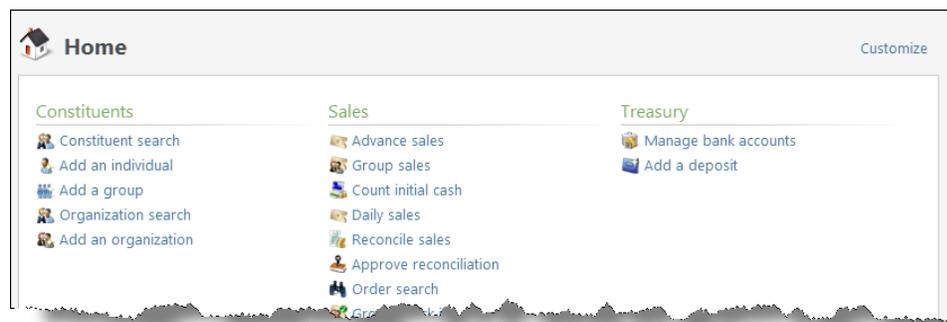
Set Up Your Workspace

You'll be spending a lot of time in *Altru*, so feel free to take off your shoes, set your iPod to shuffle, or whatever you need to make yourself at home. This includes arranging your area within the program to best suit your needs.

Take a moment and look around your desk. If you're like me, you have a stash of pencils and Post-It notes at the ready, a water bottle at arm's length, and some pictures of the kids. Maybe you've replaced the default desktop image on your computer to something fun or personal. If you're *really* like me, you also have some mementos to help set the mood (and some action figures to help burn off writer's block with, um, some imaginative play, of course). To improve your efficiency and overall experience, you can adjust your work environment—maybe bring in a file organizer, a miniature zen rock garden, or that kitschy replica of the lamp from *A Christmas Story* your spouse won't let you put up at home. Similarly, you can play with your computer and browser settings or set up your Home page to help increase efficiency.

Make Yourself at Home Page

We just talked about how your system role determines what tasks and pages appear when you log into *Altru*. This already saves you the effort of having to do spring cleaning to remove any clutter from your workspace. To further personalize your workspace within the program, you can use the Home page. The Home page is the first page that appears when you log in. Just like my pencils and notes, easily accessible and at the ready, you can put the tasks you use the most on this page. Rather than navigate to each task's functional area, you can use these tasks as soon as you enter the program.



Make Some New Resolutions

You can configure some settings to your computer and browser that affect your experience within *Altru*. For example, you can adjust the display settings of your monitor to best fit your preferences and eye sight. There's a lot of information and options available to you at any given time in the program. How much of these you see depends largely on the resolution of your monitor. If the resolution is lower, objects on your screen appear larger; the higher your resolution, the smaller the objects and the more that can fill your screen. Of course, your screen resolution choice can be as personal as how you decorate your office. I like my resolution high, but that makes others squint as they look over my shoulder.

Microsoft *Windows* users, you adjust your screen resolution through the display properties of your control panel settings. Apple *Mac OSX* users, you adjust the monitor display settings through your system preferences.

Just Browsing: Cloudy Days Ahead

Altru is what we call a “cloud service.” No, it’s not a type of precipitation – it means you access the program through an Internet browser, similar to how you maintain your *Facebook* account, surf the web through *Google* searches, or slay orcs in your favorite online role-playing game. You’re also able to access the program and your database over the Internet from multiple computers, or even from a mobile device or smart phone.

Since you access *Altru* over a browser, you can also adjust several settings that affect your experience.

- Consider the number of toolbars that appear in your browser. While it might be handy to have your weather forecast, stock quotes, and *Twitter* feed at a click, too many toolbars can decrease the area available for *Altru*. The smaller the area for *Altru*, the greater the need to scroll. From your browser, you can easily remove or hide toolbars as necessary.
- Review your browser’s shortcut keys. For example, some browsers may provide shortcut keys to open tabs or access their help files. *Altru* also provides shortcut keys to ease data entry, so you should be aware of any conflicts. Otherwise, you might accidentally select the content of a page when you mean to validate a batch.
- Similar to setting the resolution of your monitor, you should also adjust the “zoom” level of your browser as necessary. For example, the larger the zoom setting, the smaller the area available for *Altru* to appear.
- Only use the supported browsers, such as the latest versions of Mozilla *Firefox*, Google *Chrome*, Apple *Safari*, or Microsoft *Internet Explorer*. To print tickets and sales documents directly from *Altru*, you’ll need to follow the current system requirements. You can find those at <https://www.blackbaud.com/files/support/guides/ac/altrureqs.pdf>.



Introductory Backtrack

At the end of each chapter, you'll find a "backtrack" that highlights the finer points of that chapter's content. Before we move on to how you manage information about your various supporters through *Altru*, let's review the general features we just discussed in this chapter.

- Altru* is a powerful tool that enables your organization to manage its ticketing, fundraising, and finances in one place.
- From the menu bar, you can perform tasks, search for a feature or record, add new constituents or revenue transactions, view the organization calendar, or access the help file.
- From the navigation bar, you can access features and tasks by functional area.
- From the explorer bar, you can access recently opened pages and records and recently performed searches. You can also access your shortcuts to frequently used pages, tasks, and records.
- Altru* shows you only the items you require to perform your job, based on your assigned system roles.
- The Home page is the first page that appears when you log in. To reduce the amount of navigation in *Altru*, you can add the tasks you perform most frequently to your Home page.
- To further personalize your experience, you can adjust the display settings on your monitor.
- Since Blackbaud offers *Altru* as "cloud offering," you can access the program over the Internet from multiple computers and view data over a mobile device or smart phone.
- You access *Altru* over a browser, so you can also adjust several browser settings to improve your experience, including toolbars, zoom, and whether new windows open as tabs.

For detailed information about the features discussed in this chapter, including how to perform related tasks, see the *General Features Guide*, *Security Guide*, and *Administration Guide* available at <https://www.blackbaud.com/howto/altru.aspx>.

CHAPTER 2

Constituents

*"Coming together is a beginning. Keeping together is progress.
Working together is success."*

– Henry Ford

In This Chapter...

- ▶ *Constituents: The CRM of the Crop*
- ▶ *Constituent Types: Who Are All These People?*
- ▶ *Constituent Information: The Low Down*
- ▶ *Views and More Information: Inching Closer to Overload*
- ▶ *Recognition: Say Thanks Through Actions, Not Words*
- ▶ *Volunteers: Donors of Time, Not Money*
- ▶ *Constituents Backtrack*

Which Hat Do You Wear?



The content in this chapter applies most directly to board members, data entry personnel, directors, and users who manage fundraising efforts, events, group sales, communications, memberships, or volunteers. In this chapter, you learn how to add and manage information about your supporters, referred to as “constituents” in *Altru*. You also learn about ways to recognize your constituents’ contributions and how to manage those constituents who volunteer at your organization.

In *Altru*, your supporters are called *constituents*. These are all the people and businesses that support your organization and its mission. Obviously, the management of constituent data is a huge part of your arts and cultural endeavors and your fundraising efforts. After all, these are the people and organizations who you'll educate and work with to reach your fundraising goals. When it comes to constituent management, *Altru* is like a social networking friends list in overdrive.



Constituents: The CRM of the Crop

You may hear *Altru* described as “a CRM tool.” CRM stands for Constituent Relationship Management. So, who, or what, is a constituent? Basically, constituents are anyone and everyone who helps your organization support its mission. Constituents can be patrons who purchase tickets or merchandise, members who participate in your membership program, and donors who contribute money to your organization. Constituents can also be your patrons’, members’, and donors’ friends, families, and employers, who will hopefully be interested in your organization, donate to your cause, or match gifts made by other donors. Constituents can be the businesses you employ for events or communication efforts. Or they can be people like you who work for the organization (staff) or donate time and effort to enter data or prepare communications (volunteers).

You should enter all these supporters into your database as constituents, regardless of their affiliation — patron, donor, vendor, staff member, volunteer, and so on — with your organization. Your organization may have all kinds of relationships with a person or business. Take yourself for example. You may be a staff member or volunteer at your organization, but you might also be a patron, a donor, and an event registrant. Similarly, your organization may partner with another like-minded organization to host a fundraising event, and that organization may also donate to you through a matching gift program.

By maintaining all your organization's relationships as constituent records in *Altru*, you avoid the pitfalls of multiple, separate databases. A single database is more cost-effective than multiple databases, not only in the expense of database maintenance, but also in the reduction of duplicated data entry and communication efforts. And remember how your interaction with the database affects how others interact with *Altru*, and vice versa? That same thought applies here. With a single record for each person or business, you and others at your organization have a "360°" view of the people and businesses that play a role in the success of your organization, regardless of your specific interactions with them. From this record, you can view and analyze the evolution of each constituent's relationship with your organization.

Constituent Types: Who Are All These People?

Since all kinds of people and businesses can be considered constituents, *Altru* breaks them down into four different types:

- Individuals
- Organizations
- Groups and Committees
- Households

To further define your constituents, the program automatically assigns labels called “constituencies” to describe the affiliations your constituents have with your organization. You can also assign constituencies as necessary. With these constituencies, you can group similar constituents together. For example, you can send an appeal mailing or create a report for constituents with a constituency of Donor. We’ll learn about how to use *Query* to create constituent selections later.

Individuals: The People in Your Neighborhood

Individual constituents are, for lack of a better word, the *humans* in your database. These can be people who donated to your organization, your volunteers, program and event participants, and your board members. As a staff member and application user in *Altru*, you are probably an individual constituent. Individual constituents can also be people related to other constituents in your database, such as spouses and business contacts. To boil this down, any person that’s entered into *Altru*, no matter what their age or purpose is, is a constituent.

When you add a record for an individual, you enter information such as the name and contact information. You can also select whether the individual has a spouse or is part of a household. (We’ll discuss constituent households in a couple of pages). You can enter information about business relationships and employment details. It’s a good idea to enter as much information about the individual and his or her relationships as possible. Not only will it help build your database, but this information can come in handy when you interact with the constituent or ask for donations.

After you add individual constituents, you can manage information about them and track any life changes they undergo, such as marriage (yay!), divorce (bummer), or even death (but let's not dwell on that too much). For consistent data management, your organization can set up how to handle constituents who experience a life change.

1

Manage Life Changes

Deceasing
Marriage

Global rules for deceased constituents ✎ Edit

Add solicit code to deceased:	Yes
Solicit code:	Do not mail
If financial accounts exist, change EFT status:	Yes
EFT status:	Inactive
Disable wealth updates for prospects marked deceased:	No
Set record status to inactive for the deceased:	Yes
No longer give recognition credit for gifts given by the spouse:	Yes
If spouse exists, change marital status:	Yes
Marital status:	Widowed

Options for deceased constituents ✎ Edit

Individual

Update constituencies:	No	Update pending interactions:	No
Update name formats:	No	Update relationships:	Yes
Update documentation:	Yes	Update tributes:	Yes

Individual's household

Update members:	No	Update pending interactions:	No
Update name formats:	No		

Individual's groups

Show groups: No

Organizations: It's Business Time

Organization constituents are the businesses in your database. These can be business partners, organizations that donate to your cause, or vendors for events or communications. They can also be businesses with relationships to your individual constituents such as banks or employers.

When you add an organization, you can enter information such as its name and contact information. You can also select whether the organization is the subsidiary or parent of other organizations and enter information about its industry and number of employees.

With organization constituents, you can track whether they provide matching gift programs and include the conditions of their programs. When you add relationships to a matching organization, you can add claims based on the matching gift conditions to help track the matching gift revenue due to your organization. We'll discuss constituent relationships later in this chapter, but this is just one example of how maintaining a rich database of constituent information can help you generate revenue!

Groups and Committees: Constituents in a Package Deal

What's a constituent group? Think of a giving circle, where friends pool their resources to give one large donation rather than several smaller ones. While you might receive the donation directly from an individual, it represents the wallets of multiple individuals, and you'll want to give credit where credit is due. Constituent groups enable you to do this. After you add a group to the database, you can maintain a history of its members and select your primary contact with the group.

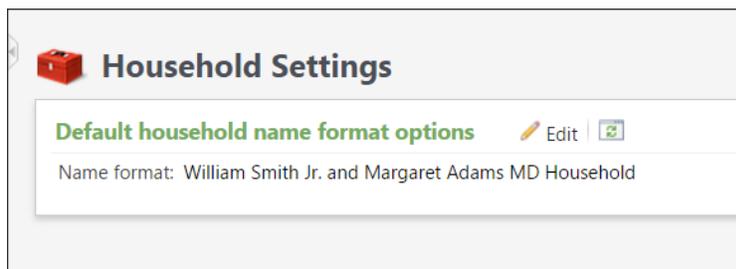
Your organization can create and manage multiple types of groups to meet your specific needs such as revenue and communications. When you create a group type, you can select whether your organization accepts revenue from that type, such as a giving circle. You can include the giving history of group members in summaries of the group's giving history. Outside of the group types you create, you can apply the Committee constituency to groups. Committees can coordinate events, but standard groups cannot.

Households: The Byrds and the Bees

Let's say Mr. Byrd, an individual constituent in your database, gets married. Maybe he falls for Ms. Bee, another constituent, at one of your fundraising gala events. You matchmaker, you! From either constituent record, you can add the spousal relationship. If, by the power vested in you and your system role, you pronounce Mr. Byrd and Ms. Bee as husband and wife in the database, *Altru* automatically creates a record for the new constituent household.

Constituent households are important to maintain. For example, when you create a communication such as an appeal mailing, you can select to send one letter to the household, even if both Mr. Byrd and Ms. Bee are on the recipient list. Not only does this reduce the cost of your communication by preventing redundant pieces of mail, it also avoids the embarrassment of the Bee-Byrds wondering why their mailbox is full of duplicate mail from your organization.

After you add a household to the database, you can maintain a history of its members, select the primary contact, and add members to the household as the Bee-Byrds expand their little family. You can also set up defaults for how to handle households. For example, you can select how to address constituent households in communication efforts.



Constituent Information: The Low Down

When you add a constituent, you probably enter a name, contact details, and maybe some basic relationship information. For example, you may include information about a spouse or an employer. After you add the constituent, you can continue to build on this information. You can also view and track the constituent's involvement with your organization. You do all of this from the constituent's record.

Elizabeth A. Ashton
 Individual Lookup ID: 2
 Constituencies: Board member Major donor Event registrant Volunteer

Personal Information
 Mrs. Elizabeth Ann Ashton
 Nickname: Liz
 Maiden: Carter

Contact Information
 Primary phone: 912-927-1215 (Home)
 Primary email

Addresses (1 of 3)
 2457 Morrison Drive
 Savannah, GA 31406
 Home (Current)

Primary Relationships
 Spouse: Dennis Ashton
 Household: Dennis and Elizabeth Ashton
 Primary business: Nature's Pantry

Documentation and Interactions
 Notes: 1
 Media links: 0
 Attachments: 0
 Interactions: 0

Memberships
 ID: Status:
 Expiration:
 Level:
 Member since:

Revenue summary View all revenue Recent revenue

Revenue type	Amount	Date	Description	Amount
Total revenue:	\$12,825.00	6/1/2007	Donation	\$7.50
Total household revenue:	\$12,825.00	1/18/2007	Donation	\$27.00
Membership revenue:	\$0.00	6/15/2006	Donation	\$5.00
Event revenue:	\$0.00	11/28/2005	Donation	\$0.00
Ticket revenue:	\$0.00	10/15/2005	Donation	\$0.00

Remember when we said that when it comes to constituent management, *Altru* is like a social networking friends list in overdrive? Well, think of the constituent record as the profile page for the constituent. But this record provides more valuable information than the latest status update and photos from a trip abroad (although you can track that information here as well if

you'd like!). From the record, you can view and manage all kinds of information — from giving summaries to group and household members to relationships and constituencies — to ensure a strong, beneficial relationship with the constituent. To help you manage and organize all this information, the constituent record contains multiple tabs.

Summary Information: In a Nutshell

At the top of each constituent record, profile information appears in a series of summary tiles. Under the tiles, the constituent record also contains multiple tabs of additional information. For an individual, a group, or a household, you can use the Summary tab to view information such as recent interactions, revenue transactions, and communications. For a group or household, you can view information about current members. Think of this summary information as a quick snapshot of the constituent and his or her involvement with your organization.

Members: Parts of a Whole

For a group or household, you can view and manage members on the Members tab. Each member of a household must be an individual constituent in your database, while groups can include individuals and organizations. In some cases, members may appear with only a constituency of "Relation," which means they're only in your database because of a relationship with another constituent. This relationship information can help as you cultivate your own relationship with the active constituent... and these additional Relation constituents have the potential to become active in the future.

On the Members tab, you can add and remove members from the group or household. When you remove a member, you can retain the constituent record and maintain your relationships with the individual. For example, if the Bee-Byrds were to decide to divorce (no!!!), you could dissolve the household and still maintain a separate relationship with each. You could also retain the household record to keep their giving history from when they were together. (But don't worry about the Bee-Byrds... those two crazy kids are rock solid!)

Contact Information: Reach Out and Touch Someone

Obviously, contact information is good to have for constituents. After all, you'll likely need to communicate with constituents at some point, whether to solicit gifts, set up volunteer jobs, or hire caterers for an event. On the Contact tab, you can view and manage addresses, phone numbers, and email addresses for a constituent.

You can associate multiple addresses, phone numbers, and email addresses with a constituent. For example, you can track the constituent's home, office, and seasonal vacation home contact information, which comes in handy when you send communications to the constituent. On the Contact tab, you can also keep details such as whether the constituent asks you to not use a work address or phone number and whether contact information should be shared with others outside your organization. You can even retain a record of previous contact information when a constituent moves to a new address or gets a new phone number.

Personal, Organization, and Detail Information: The Nitty-Gritty

For individuals, organizations, or groups and households, you can use the Personal Info tab, Organization Info tab, or Details tab, respectively, to track the low-down on constituents.

The Personal Info, Organization Info, and Details tabs provide sections to track websites such as a company website, personal blog (where the constituent probably says nice things about your organization and its mission), or Twitter feed (ditto, in 140 characters or less).

You can also track demographic information. For individuals, you can track information such as ethnicity, religion, and annual income, which can be useful target marketing efforts and communications. Similarly, for organizations, groups, or households, you can track annual income and targeted giving level. Not to sound too much like an infomercial spokesperson, “But wait! There’s more!” Essentially, this tab is where you can keep track of all the non-essential, but valuable nonetheless, information about a constituent (“Call now! Operators are standing by!”).

On this tab, you can manage constituent interests. For individuals, you can track preferences such as religious or dietary restrictions, to keep in mind when they register for events. For organizations, you can track the conditions of matching gift programs.

For individuals and organizations, you can track even more information. We’re talking the finer details here.

- For individuals, you can manage information such as nicknames, ages, Social Security numbers, and birth dates.
- For organizations, you can manage information such as industry, parent organizations, and number of employees.

Relationships: Connect the Dots

Ever play “Six Degrees of Kevin Bacon”? You know, that game where you try to link a random celebrity to the ubiquitous *Footloose* star to see how closely connected they are (excluding Kyra Sedgwick (aka Mrs. Kevin Bacon))? Tracking relationship information on your constituents is sort of like that, but with your organization as Kevin Bacon. Some relationships have obvious value to track. For example, spousal relationships are vital to ensure the effective use of households in recognition and communications. Similarly, employee/employer relationships are beneficial to track, especially when individuals work at organizations with matching gift programs. On the Relationships tab, you can track these relationships for a constituent.

On this tab, you can track additional constituent relationships for extended family members, attorneys, or guests brought to events as just a few examples. These constituents, added only as relationships to other constituents, appear with the constituency "Relation." Much like how the aforementioned Kevin Bacon's initiative SixDegrees.org matches non-profits like yourself with potential donors, *Altru* helps you find potential donors among the relation constituents who share the interests and concerns of your existing donors. Think of it as playing "Six Degrees of Your Organization"!

Your organization may assign solicitors, or fundraisers, to manage and foster your relationships with specific constituents. You can assign and track these fundraisers as constituent relationship managers under Constituencies on the Personal Info tab.

Constituencies: Labeling People

In high school, it seemed like labeling the student body was the norm — the preps, the jocks, the emo goths, the freaks, the geeks. Constituencies are labels you can apply to your constituents without all that cliquey high school drama. On the Constituencies tab, these labels enable you to quickly identify why a constituent (of any type) appears in your database and to group similar constituents.



Atru automatically applies constituencies such as “Event registrant” and “Volunteer” to constituents based on their activities or affiliations with your organization. You can also create and assign your own “user-defined” constituencies based on criteria specific to your organization. You can also apply a constituency of “Committee” to allow groups to coordinate events and solicit revenue for your organization.

Constituents automatically receive the constituency “Patron” when they pay for sales orders. Similarly, constituents automatically receive the constituency “Donor” when they donate to your organization. However, you can edit the requirements for constituents to be considered donors by your organization. For example, does your organization still consider constituents as donors if they haven’t donated in the past three years?

Documentation: Crib Notes

As you develop your relationship with a constituent, you might learn information or have experiences worth taking note of. Maybe you read an interesting article about the constituent. Or maybe the constituent makes that favorable blog post or tweet we mentioned earlier, encouraging others to support your mission. On a constituent's record, you can track this information on the Documentation and Interactions tab. Think of this tab as your crib sheet for the constituent.

You can manage notes to keep track of the random information that you learn through discussions or experiences with the constituent. You can use media links to capture the constituent's online presence (like that blog post). And with attachments, you can save digital files about the constituent, such as PDFs or scanned images of newspaper clippings.

Names: A Constituent By Any Other Is Just as Sweet

Later on, when we discuss communications, we'll talk about default name format options — the addressees and salutations — that determine how you refer to constituents in communications. If you discover a constituent prefers to be addressed differently than your default settings, you can capture that information on the constituent's record. For example, if a constituent requests that you always address him by job title, so you can set up a custom name format, a la "Mr. Lyman Frank Baum, Royal Historian of Oz." When you create a name format for a constituent, you can assign it a type and select whether it is the primary addressee or salutation for the constituent.

Similarly, a constituent may have an alias that you want to remember. For example, an individual may have a maiden name or stage name, or an organization may be better known by an acronym than its full name. You can use aliases to search for constituents in the database.

Accounts: Banking on Recurring Givers

Recurring giving can provide a nice reliable stream of income. Unlike a one-time donation, pledges and recurring gifts provide the promise of multiple, scheduled payments. When you add a pledge or recurring gift for a constituent, you can set up automatic payments for the installments, using a credit card or through an electronic funds transfer (EFT), also referred to as direct debit.

With direct debit, you run a process that creates a file to send to your bank, who then pulls funds from the constituent's bank account according to the installment schedule. On the Revenue tab under Accounts, you can manage the bank accounts that your organization uses to process a constituent's direct debit transactions.

Views and More Information: Inching Closer to Overload

With all its tabs, a constituent record is pretty close to a one-stop shop for the information you might want to know about a constituent. However, much like you, a constituent can be a multi-faceted individual (or organization, group, or household). So, on the constituent record, you can access additional views and information for details about other aspects of the constituent.

Remember how constituencies are the reasons why constituents appear in your database? A constituent may have multiple constituencies, which means your organization may interact with the constituent for many reasons. For example, in addition to being a donor, a constituent may also be an event registrant AND a member of your organization's membership program (busy, busy!). From the constituent's record, you can view the constituent through the lens of each constituency. For example, if the constituent is also an event registrant, on the Events tab you can view the events attended and any outstanding event registration fees.

On the constituent's record, you can also access more information about particular aspects of the constituent. For example, on the Revenue tab, you can access a revenue history to view all giving and revenue associated with the constituent. Or you can view and manage communications on the Communications tab, and interactions with the constituent on the Documentation and Interactions tab. For example, as you develop your organization's relationship with a constituent, you might begin to reach out in different ways—a phone call; a quick personal note of thanks; maybe a meeting for lunch. It is important to track all contacts you have with a constituent using Interaction records in *Altru*. Not only that, but in the course of all those contacts, you'll probably learn more about how that constituent prefers to receive communications from your organization. You can record those preferences on the Communications tab.

Recognition: Say Thanks Through Actions, Not Words

When constituents donate to your organization, it's good form (and proper accounting) to send them acknowledgement letters and receipts as thanks. Beyond that, however, you should also offer additional recognition for the part constituents and donors play in your success. Not only does this let your constituents know how much you value your relationship, but it can also encourage others to increase their interaction with your organization and improve the effectiveness of your fundraising efforts.

Recognition Programs: Gold Stars for Your Constituents

Much like how a teacher might award students with a gold star for good behavior, you can set up recognition programs to award constituents based on their annual giving. For example, you can set up a program to recognize constituents when their total donations reach a specific amount over the course of a year. To award constituents differently based on their giving totals, your recognition program can have multiple levels such as Bronze, Silver, and

Gold and give constituents additional benefits based on their recognition level. After you set up a recognition program, you can create and run a process to automatically apply the appropriate levels to constituents based on their giving history. To keep your constituent recognition information current, you can set the process to run at regular intervals behind the scenes.

Tributes: Paying Homage

With a tribute, a constituent can request that your organization receive donations to a designation “in honor of” or “in memory of” another constituent. For example, to recognize a constituent’s major gift or heavy involvement, you can set up a tribute that others can donate to “in honor of” the constituent’s activity. Not only can a tribute help recognize a constituent’s activity or relationship with your organization, but it can also motivate other constituents to donate to a specific designation associated with the tribute. Tributes can also encourage the honored constituent’s families and friends, who may not already be involved with your organization, to donate and help build your constituent base.

Volunteers: Donors of Time, Not Money

Remember, “constituents” is just a fancy term for your supporters. One important group, or *constituency*, of supporters is your volunteers. Rather than opening their wallets, these are constituents who donate unpaid time to support your organization. These are the high school students you enlist to help out in exchange for evidence of community service on their college admission applications; the patrons so enamored with your programs they

offer to work behind the scenes; the donors who get a bigger sense of contribution by offering their time in addition to their money. *Altru* provides additional features so you can manage your volunteers and the opportunities for them to help you. In fact, *Altru* provides so many additional features, they appear together in *Volunteers*.



Keep in Mind...

Eventually, most volunteers donate to the organizations they serve. Keep your volunteers happy, and don't overwork them. When assigning volunteers to jobs, look at their job history to determine whether to ask for additional use of their free time or instead suggest a donation or pledge.

Volunteer Configuration: Set the Stage for the Stagehands

Before you start to add volunteers to your database, your organization should set up your volunteer program in *Altru*. What sort of volunteers and skill levels do you require? Do you screen volunteers before you assign them to jobs? How do you recognize your volunteers' hard work? From *Volunteers*, you can perform several configuration tasks to lay this groundwork to ease coordination and management of your volunteers and volunteer jobs.

Screening Plans

A screening plan is a list of steps volunteers must complete before you can assign them to a job. This may be routine background screening you perform on all volunteer applicants, or you can set up plans for specific jobs that require additional skills or qualifications. Depending on your needs, the plan can be simply one step or a very detailed list of multiple steps. When you add a screening plan, you set up its required steps and the number of days to allow for each step. Determining these deadlines can help ensure the volunteer continues through the screening process.

Skill Levels

When assigning volunteers to jobs, it helps to know just how experienced a volunteer is at specific skills or traits. For example, for a complex job, it would likely be better to assign an experienced or professional level volunteer than a beginner or novice. From *Volunteers*, your organization can set up these levels to indicate the skill rankings of your volunteers and meet the needs of your organization. Then, when you add traits to a volunteer, you can assign these levels to indicate how proficient the volunteer is at each skill.

Volunteer Types

Volunteer types indicate how a volunteer serves your organization. For example, your organization may use volunteers to stuff envelopes for a communication, to give tours as a docent, or to staff the registration table at events. You can apply multiple volunteer types to a volunteer, depending on the diversity of the volunteer's skill sets.

From *Volunteers*, your organization can set up the categories or types of volunteers you use to help match volunteers to specific jobs. When you add a volunteer type, you can associate it with a screening plan to ensure volunteers meet the requirements of the jobs performed by that type.

Volunteer Awards

Similar to the constituent recognition discussed a few pages back, you can use volunteer awards to recognize a volunteer's dedication and service to your organization. For example, you might award a volunteer with a certificate when they reach 100 volunteer hours. From *Volunteers*, you can set up the awards you use to honor the contributions of your volunteers.

Volunteer Management: Handle Your Helping Hands

At the beginning of the chapter, we talked about how you should add all your supporters to the database as constituents, regardless of their affiliation to your organization. This is no different; your volunteers are constituents. Hopefully they already exist in your database as such and are just now raising their hands to see how else they can support your mission. However, for new volunteers, first add them to your database as constituents. After they exist in your database as constituents, you can add them as volunteers from *Volunteers*.

When you add a volunteer to the database, you select the constituent to add as a volunteer and enter emergency contact information. You can also specify whether an organization sponsors the volunteer. *Altru* then creates a record of the constituent's volunteer activity and assigns a constituency of Volunteer to the constituent. From the Volunteer tab of the constituent record, you can add and manage details about the volunteer.

General Information. Under General, you can track the applicable volunteer types and emergency contact information. You can also view a summary of the volunteer's contribution, including job activity and the number of hours donated for the year and over the lifetime with your organization. If you assign monetary values to your jobs, you can also view the amount of revenue the volunteer saved your organization.

Similar to how a dating website plays matchmaker by creating couples out of compatible personality traits, *Altru* enables you to match volunteers to open jobs based on the skills required to perform the job. To ensure you match the best volunteer to a job, you should track information about each volunteer's traits such as skills, interests, and certifications. When you add a skill to a volunteer, you must also select their skill level.



Did You Know?

You can use traits to track any special needs of volunteers that might affect their ability to perform jobs. For example, you might not want to assign a job of moving boxes of merchandise to a volunteer with a bad back.

Availability. In addition to a volunteer's traits, the availability of the volunteer is another important consideration in assigning jobs. Under Availability, you should track what days and times each volunteer can work, such as during evenings or weekends. You should also track locations where the volunteer can work. When matching volunteers to open jobs, *Altru* automatically filters out volunteers with incompatible schedules.



Did You Know?

For volunteers with inconsistent availability, do not enter any availability information. Similarly, if a volunteer can work at all locations, do not enter any location information. When matching volunteers to jobs, *Altru* will always return these volunteers as possible matches so you can contact them directly to check availability.

Timesheets. To properly award volunteers for their contribution, you should track the amount of time a volunteer works with your organization. To record the dates and hours a volunteer works to complete assigned jobs, under Timesheets, you can manage timesheets for the volunteer. If you assign monetary values to your jobs, *Altru* uses these timesheets to calculate the amount of revenue the volunteer saves your organization.

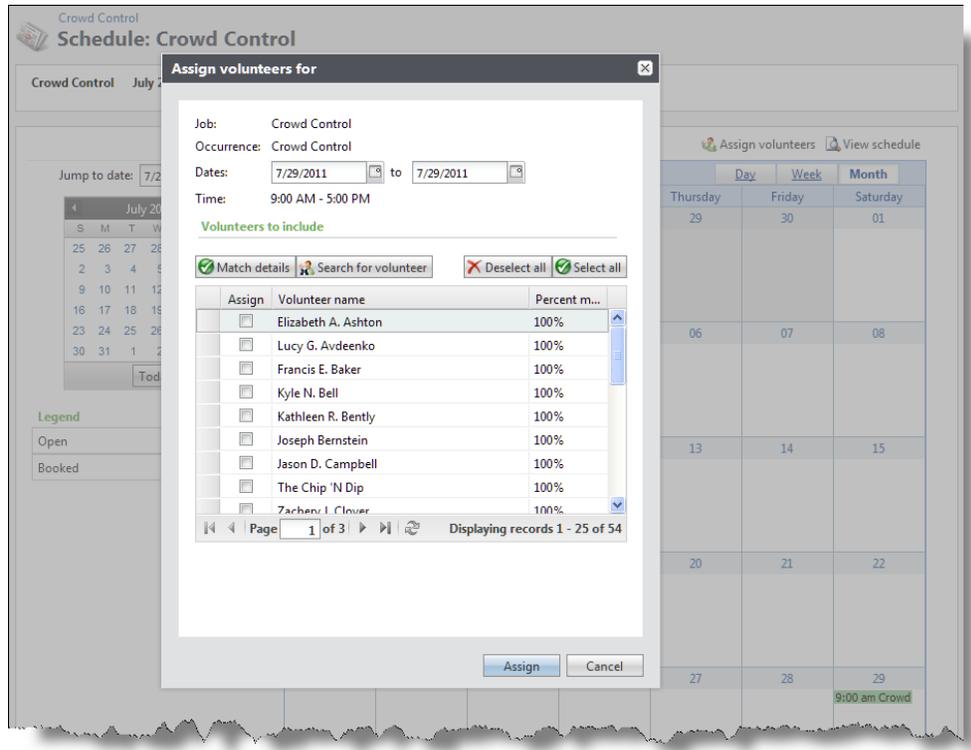
Awards. You can use volunteer awards to recognize a volunteer's dedication and service to your organization. Under Awards, you can track which awards volunteers receive and the dates you give the awards.

Documentation. Similar to documentation about a constituent, under Documentation, you can manage notes, media links, and attachments to keep track of information that you learn through discussions or experiences with the constituent as a volunteer.

Volunteer Jobs: Avoid Idle Helping Hands

From *Volunteers*, you manage the jobs that your volunteers perform. When you add a job, you select the type of volunteer required to complete the job. To track the value of your volunteers, you can also enter an estimated hourly rate you'd pay an employee to perform the same job. After you add a job, you can then manage the specific times and locations of the job as *occurrences*. Some jobs may occur only once, while other jobs may be more routine and occur multiple times over an extended period.

After you set up a job, you can assign its occurrences to volunteers from the job's schedule or the Job Openings page. Here's where *Altru* plays matchmaker and lists the possible matches for a job based on type, traits, and availability.



If necessary, you can also assign an occurrence to volunteers who typically wouldn't be compatible, such as a volunteer who has cleared a normally hectic day schedule just to help with an event.



Constituents Backtrack

Before we move on to how you can manage your program events and tickets through *Altru*, let's review how you manage constituent data.

- You enter everyone who supports your organization's mission as constituents in *Altru*, regardless of affiliation or relationship.
- Altru* handles four types of constituents: individuals, organizations, groups, and households. Your system administrator can set up default settings for each constituent type.
- You can track whether organizations have matching gift programs and their conditions. You can also add relationships to individuals when you create matching gift claims.
- You can use households to reduce the cost of communications and prevent constituents who share an address from receiving duplicate mail from your organization.
- Constituencies allow you to quickly identify why a constituent appears in your database and group similar constituents. In addition, *Altru* assigns each donor a status based on giving history that you can use to target communications.
- When you apply the constituency "Committee" to a group, the group can coordinate events for your organization.
- You can use aliases to search for constituents in the database.
- To recognize the contributions of your constituents and improve your fundraising efforts, you can set up recognition programs and tributes.
- Use tabs on a constituent record to access details about other aspects of the constituent, such as memberships, event registrations, and sales orders.
- On the Volunteer tab, you can manage your constituents who donate unpaid time to support your organization.
- Altru* helps match volunteers to job occurrences based on type, traits, and availability.

- ❑ To track the value of your volunteers, you can enter the estimated hourly rate you'd pay an employee to perform the same job. *Altru* then uses your volunteers' timesheets to calculate the amount of revenue they save your organization.

For detailed information about the features discussed in this chapter, including how to perform related tasks, see the *Constituents Guide* and *Volunteers Guide* available at <https://www.blackbaud.com/howto/altru.aspx>.

CHAPTER 3

Tickets and Programs

*“Logic will get you from A to B.
Imagination will take you everywhere.”*

— Albert Einstein

In This Chapter...

- ▶ *Programs: A Quick Primer*
- ▶ *Ticket Sales Setup: You Got a Checklist For That?*
- ▶ *Print Setup: Yep, We Have a Checklist For That Too*
- ▶ *Programs: It's Scheduling Time!*
- ▶ *Schedule Events: Pencil Us In*
- ▶ *Program Calendar: What's Going On Around Here?*
- ▶ *Tickets and Programming Backtrack*

Which Hat Do You Wear?



The content in this chapter applies most directly to guest services managers. In this chapter, you learn about the setup processes for ticket sales and printing, as well as programming your daily admission and scheduled program events.

You sell tickets. This is at the heart of what your organization does on a daily basis and it's integral to your mission. The tickets you sell to patrons provide funding and give you the opportunity to capture vital information about people who may not currently be donors but could be in the future.

When patrons buy tickets to a scheduled event or general admission program at your organization, they are stating with their actions that they have an affinity for what you do and for your mission. This may be their first visit, but they came. And if you engage them, it's likely that they'll return.

Before you can sell tickets in *Altru*, you'll need to perform a number of setup tasks. Some are the "one and done" variety while others, like scheduling programs, are things you'll do on a regular basis.

Programs: A Quick Primer

With *Altru*, you can sell tickets for different types of programs. Some organizations might only sell admission tickets, while others sell tickets for timed events and workshops that require registration. Whatever your ticket sales needs, we have you covered. Well, unless you sell lottery tickets... That's something we don't handle.

Before we take a look at the steps you'll need to complete before you can schedule programs and sell tickets, let's get familiar with the types of programs your organization can offer through *Altru*.

Daily admission programs. Daily admissions are the simplest form of program. They're designed for general admission organizations who sell untimed tickets all day for admission to their facility.

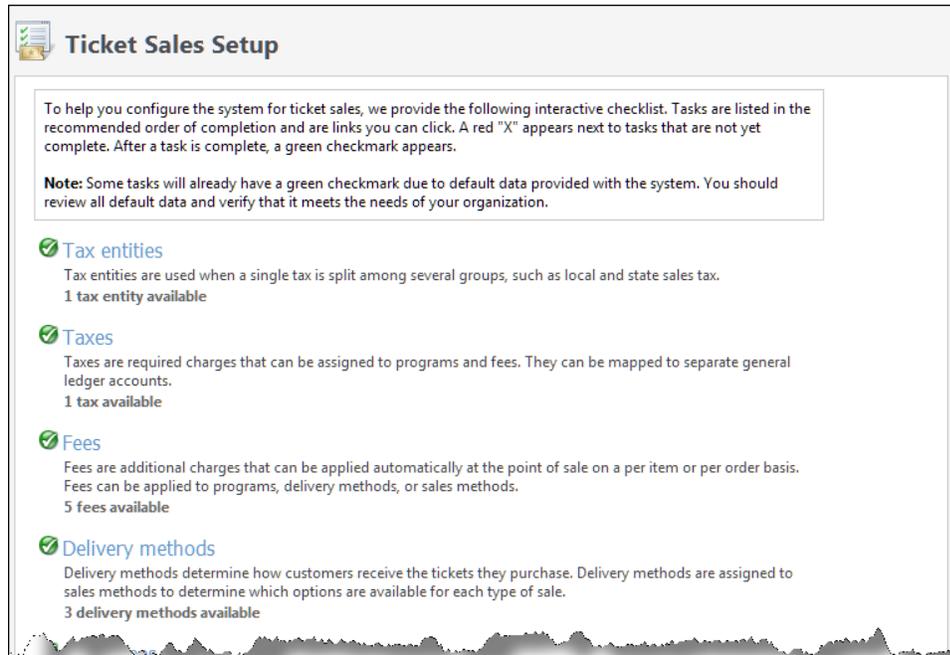
Scheduled programs. You configure scheduled programs to sell tickets for timed events like exhibits or movies. For example, if your organization has a sea turtles exhibit that occurs three times a day on Mondays and Wednesdays, you would set up a sea turtles scheduled program and then schedule events according to the day and time of each occurrence.

Preregistered programs. You can also set up scheduled programs that require registration. These “preregistered programs” are helpful when you offer workshops or other types of programs that have limited space and would benefit from an attendee roster. You can also record registrant preferences on these programs. For example, you can track meal preferences or the shirt size they would like.

Let’s move on to the setup tasks you’ll need to complete before you can sell tickets. As we go over these tasks, keep these program types in mind.

Ticket Sales Setup: You Got a Checklist for That?

Actually, yes we do. And it’s not your typical checklist — this one is better because it’s interactive and it lives in the application. It tracks what you’ve already completed and has links that take you to each place you need to go to complete a task. So where is this magical checklist located? From *Tickets*, just click **Ticket sales setup**.



Ticket Sales Setup

To help you configure the system for ticket sales, we provide the following interactive checklist. Tasks are listed in the recommended order of completion and are links you can click. A red "X" appears next to tasks that are not yet complete. After a task is complete, a green checkmark appears.

Note: Some tasks will already have a green checkmark due to default data provided with the system. You should review all default data and verify that it meets the needs of your organization.

- ✓ **Tax entities**
Tax entities are used when a single tax is split among several groups, such as local and state sales tax.
1 tax entity available
- ✓ **Taxes**
Taxes are required charges that can be assigned to programs and fees. They can be mapped to separate general ledger accounts.
1 tax available
- ✓ **Fees**
Fees are additional charges that can be applied automatically at the point of sale on a per item or per order basis. Fees can be applied to programs, delivery methods, or sales methods.
5 fees available
- ✓ **Delivery methods**
Delivery methods determine how customers receive the tickets they purchase. Delivery methods are assigned to sales methods to determine which options are available for each type of sale.
3 delivery methods available

This checklist is a suggested workflow for initial configuration. The tasks are presented in a specific order because some tasks build on others. While you must complete some tasks, like adding locations and setting prices, other tasks are optional. For example, not all organizations will charge fees or taxes. The tasks your organization will complete are directly related to your business processes.

Tax Entities and Taxes: Pay "The Man"

If your organization isn't required to collect taxes, it's your lucky day and you can skip this section. If you do collect taxes, you've got a little work to do. You'll need to set up tax entities and taxes in *Altru*.

At least one tax entity is required for each type of tax you collect. For example, if you collect a state sales tax, you must add a tax entity for the state. You can also use multiple tax entities to group similar taxes together. For example, if your organization collects different sales taxes for state, city, and county governments, you can group all of these in one sales tax entity. You can also make one tax the default automatically applied to all taxable merchandise.

After you have tax entities squared away, you add the actual taxes and configure rates. Taxes can be assigned to individual programs, events, and any other merchandise or services you sell. If you collect special “lifestyle” taxes, you can also specify which merchandise items the taxes apply to. For example, if you have a local junk food tax, you can define which food items are subject to the tax, such as sodas or candy.

Fees: Don't Nickel and Dime Me

Similar to fees you pay at the airport for extra baggage or priority boarding, fees in *Altru* are additional charges for “extras” that can be applied automatically at the point of sale. Once a fee is assigned, it cannot be removed, adjusted, or discounted during a sale. You can charge fees on a per item or per order basis.

The fees you charge can be flat amounts or a percentage and depend entirely on your business processes. For example, if you offer delivery through standard or overnight mail, you would define fees for each option and then add them to the appropriate delivery methods. Your organization may also configure fees that are assigned to specific sales methods. For example, you might charge a handling fee for Advance Sales but not Daily Sales.

Additionally, you may need to set up per item fees for programs. For example, you might offer an art workshop that requires a materials fee. When a sales order is processed that involves a program with a fee, the appropriate fee is automatically charged for each ticket purchased.

Delivery Methods: Is This for Here or to Go?

Delivery methods determine how patrons receive the tickets they purchase. Common delivery methods include In person, Will call, Standard mail, Overnight mail, Email, and Hot air balloon. Ummm, scratch that last one. The guest services manager typically sets up delivery methods during initial setup, but you can add new methods at any time.

After you add delivery methods, you can assign them to specific sales methods. For example, if you offer advance sales, you would make sure that Standard mail, Overnight mail, and Will call are all valid delivery methods for the Advance Sales sales method.

You can also assign fees to delivery methods. For example, you might charge an extra \$20 for Overnight mail. (Side note: Like other types of fees, once these are assigned, they cannot be removed, adjusted, or discounted during a sale.) Additionally, you can choose for a delivery method when to print or email tickets and receipts for a completed order. For example, you may want to wait until the day of the event to print tickets and receipts for will call orders.



Did You Know?

To ensure there's enough time for tickets to reach patrons before an event, you can place a block on a delivery method so it's unavailable at a certain point before the event's start date. For example, you may want to block Standard mail as an option 3 days prior to the event.

Price Types and Price Lists: What's the Damage?

Price types are the units used to measure attendance, such as Adult, Senior, and Child. Price types can have different prices for various programs and program events. After you configure price types, you create price lists which provide a starting point for ticket prices on programs and program events. When you add a price list, you select the price types to include and define the base price for each type before any discounts or fees are applied.

Price lists are useful if you have multiple programs that share the exact same price types and prices. You can also load a price list to one or more programs to quickly establish standard prices and then adjust specific prices as needed. Using price lists gives you flexibility to use the same price types but charge different amounts for different programs. For example, an Adult ticket to the Sea Turtles lecture may be \$10 while an Adult ticket to the Turtles Tank Tour may be \$5. For consistency, we recommend that you add each price type your organization plans to use before you create price lists.

Sales Methods: Any Way You Want It, That's the Way You Get It

Patrons purchase tickets from your organization in different ways. For example, they may buy tickets over the phone or in person at a customer service desk or box office. In *Altru*, we call these options "sales methods" and Daily Sales, Advance Sales, Group Sales, and Online Sales are included for you out of the box. You just have to set them up for use. You can't add other types of sales methods.

Each sales method will have different requirements that need to be configured, such as the delivery methods, fees, forms of payment, and valid price types.

For Daily Sales and Advance Sales, you can choose which itemized receipt options to use. You can add **Print receipt**, **Email receipt**, and **No receipt** buttons to the Daily Sales and Advance Sales pages. Want to save time and money? Of course you do! Ask patrons if they need a receipt. If they say no, use **No receipt**. This will save printer paper and move patrons through the line quicker.

You can also restrict price types based on sales methods. For example, you can have a price type specifically for your staff members that provides a discounted price for certain programs. Since your staff would buy their tickets at your organization, you would disable this price type for the Online Sales sale method, which would also ensure the price type is not available to the public.

Discounts and Promos: Hook Me Up

Everybody loves getting a deal, right? Um, yeah! To help drive sales and provide increased incentive to purchase tickets, merchandise, and memberships, you can offer various promotions through **Altru**. Promotions include discounts, ticket combos, and membership promotions that encourage renewal, joining, and upgrading.

Standard discount. Like the name states, this discount is pretty standard. It provides a reduction in the price of tickets, memberships, merchandise, or services purchased from your organization. You can configure standard discounts that reduce the price of specific items purchased or an entire order. Standard discounts can be applied automatically, manually, or with a code.

Required purchase discount. These are discounts that require a specific item to be purchased to receive a reduction in price. For example, you can configure a discount that gives patrons 50% off a child's admission when they buy two adult admissions at full price. You can configure similar discounts available only for merchandise items, or both tickets and merchandise items. These discounts cannot be applied automatically to sales.

Quantity discount. You can also configure discounts that are based on the quantity of tickets or merchandise items purchased. For example, you can configure a discount that gives the patron a 20% discount on each ticket or merchandise item when they purchase five admission tickets or items. Quantity discounts can be applied automatically, manually, or with a code.

Combinations. To increase incentive for patrons to purchase admissions and tickets to scheduled program events, you can create and sell combos. These are bundles of two or more program events, selected from specified program groups, and sold together as a single item. For example, admission to the museum plus a tour of a nearby historic site could be sold as a combo and cost less than if each was purchased separately.

Membership promotions. To encourage patrons to join membership programs or current members to renew or upgrade their memberships, you can configure membership promotions. These are discounts on the cost of memberships or term extensions on memberships. For example, you can create a membership promo for current members that provides a 20% price reduction when they renew before the end of the year. Membership discounts can be applied manually or with a code.

When you add a discount, you'll need to configure availability parameters that determine when the discount is valid and which sales methods can use it. You can also restrict discounts based on price type, if the patron is a member or part of a particular constituency. If the discount will be used for merchandise, you will also need to configure which departments and merchandise items are eligible.



Did You Know?

Discounts can be applied automatically or manually at the point of sale, or with the entry of a valid promotion code. When you configure manual discounts or promotions, the **Discounts and promotions** button appears on the Daily Sales page. Your sales team will use this button to choose which discount or promotion to apply. If they frequently apply the same discounts or promotions, we recommend those discounts or promotions get their own special buttons. For example, you can create a "Buy One, Get One Free" button.

Locations: Where's the Show?

In *Altru*, each scheduled program that you're going to sell tickets for must take place in a location you configure. For each location, you define address and contact information, and location capacity. The maximum capacity determines the number of tickets available to sell for an event. After a location is added, it's available for use by all programs and fundraising events.

Program Categories: Get Organized

Program categories allow you to organize the programs you sell by type, such as Lecture, Exhibit, or Walking tour. This is helpful if you want to group data on reports by program type.

We recommend that you set up program categories before adding programs. By setting them up ahead of time, you can simply select the appropriate category during the add program process. You should also make sure program categories are distinct because you can assign only one program category per program.

Resources: Party Hats? Check!

Resources are people or items you need to provide for program events or group reservations. There are two types you can add:

Supplies and Equipment Resources. Supplies and equipment resources are consumable or non-consumable items needed for a program event or group reservation. For example, an educational program may require additional chairs and a projector, while a birthday party may provide a birthday cake and party hats.

When you add a supply or equipment resource to *Altru*, you define the total quantity available and how to determine the number needed for the event. For example, the quantity needed can be calculated based on the number of tickets sold. If the resource is for a group sales event, you can add additional costs to the resource using a flat rate or hourly rate pricing structure.

Staffing Resources. Staffing resources are people who work or volunteer for a program event or group visit. For example, you may need event volunteers for exhibition openings or tour guides for large groups.

When you add a staffing resource to *Altru*, you can define the total quantity of staff available to serve as this type of resource. If the staffing requirement is based on the number of people in a group, you can define the capacity per resource. For example, if your tours have a maximum of 20 participants, a group with 100 participants will need 5 tour guide resources. If the resource is for a group sales event, you can add additional costs to the resource using a flat rate or hourly rate pricing structure.

Print Setup: Yep, We Have a Checklist for That Too

When a sale is completed, a number of documents print as part of the sales process. These documents can include tickets, itemized receipts, credit card receipts, refund receipts, etc. We call these “sales documents” in *Altru*.



Keep in Mind...

The types of sales documents that print after a transaction depend on multiple factors including the items involved in the transaction, whether the transaction is a sale or refund, and the sales method, delivery method, and payment method used. To keep lines moving, the itemized receipt always prints after credit card receipts. This allows the patron to sign the merchant copy of the credit card receipt while the itemized receipt is printing.

Because printing setup requires many steps, we provide another interactive checklist to help guide you through the process. This checklist provides links to the locations where you can complete each task. A green checkmark indicates when a task is complete. To access the checklist, from *Tickets*, click **Print setup**.

Print Setup

To help you configure the system to print sales documents, we provide the following interactive checklist. Tasks are listed in the recommended order of completion and are links you can click. A red "X" appears next to tasks that are not yet complete. After a task is complete, a green checkmark appears.

Note: Some tasks will already have a green checkmark due to default data provided with the system. You should review all default data and verify that it meets the needs of your organization.

- Organization information**
Specify organization information including name, address, phone number, and website. The information you enter will be displayed in reports and sales documents generated by the system. For example, when a receipt prints after a ticket sale, the organization information you enter is displayed on the receipt.
Organization information configured
- Workstation interface**
Set up the interface to allow users to print from the current workstation. Users must use Internet Explorer to print sales documents.
Note: You must set up the interface on every workstation that needs to print sales documents. If users attempt to print from workstations that are not configured, they are prompted to set up the interface.
Workstation interface not configured

Workstation Sales document
Printer lists

To help you get a sense of what you'll need to do when setting up for printing, let's break it down into a few bite-sized chunks:

Enter your organization information. The first step is to enter your organization's name, address, phone number, and web address. This information appears on sales documents and reports. For example, when a receipt prints after a sale, your organization name and contact information appears on the receipt.

Set up workstations. Add "workstations" to every computer in your organization that needs a cash drawer or to print tickets and sales documents. Then assign printers to those workstations. Pro tip: You must use *Internet Explorer* or *Chrome* on all workstation computers.

Add printer lists. Set up printer lists to group printers with similar capabilities. This ensures that tickets and other sales documents print on compatible printers. For example, if you use specialized printers for tickets and receipts, you should add a "Ticket Printers" list that includes all your ticket printers and a "Receipt Printers" list that includes all your receipt printers.

Set up sales document templates. Sales document templates determine the layout of tickets, receipts, and other documents. *Altru* provides preconfigured ticket and sales document templates. In most cases, the default templates will probably suit your needs and the only extra thing you'll need to do is assign their printer lists and printing rules.



Did You Know?

Unlike other sales document templates, the ticket template can be customized. You can download the default Scalable Vector Graphics (.SVG) file to customize the ticket's layout and appearance in a vector graphics program, such as *Inkscape*. If you plan to create multiple custom ticket layouts, you'll need to create a ticket template for each customized .SVG file.

Programs. Assign ticket templates to programs that print tickets.

Delivery Methods. On each delivery method, you can select whether to print sales documents immediately after an order, print them at a later time, or send them by email.

Barcode Font. Download the Barcode Font to every workstation that will print barcodes on ticket, membership cards, or merchandise labels for scanning.

For detailed information about the tasks needed to set up for printing, see the Workstations and Printing chapter of the *Tickets Guide*.

Programs: It's Scheduling Time!

Alrighty, after you square away printing setup, you can get down to the programming nitty gritty — adding and scheduling daily admission programs, scheduled event programs, and preregistered programs. We talked about these briefly at the beginning of the chapter. Now, we'll take a closer look at each.

Daily Admission Programs: All Day, Every Day

With daily admission programs, there are no specific timed events. Instead, patrons simply buy tickets to the program. Daily admission programs are commonly used for tickets that you sell throughout the day, such as admission tickets for museums or aquariums.

When you add a daily admission program in *Altru*, you can select a location and set your prices. To set prices, you can load a price list or assign specific price types and face prices. You can also choose which sales methods (daily, advance, group, or online sales) can sell tickets to this daily admission program.

Price type	Face price
Adult	\$10.00
Child	\$5.00
Senior	\$7.00
Student	\$7.00
*	

After you add a daily admission program record, you can assign fees, taxes, and discounts, and choose which ticket template to use for printing tickets. If you plan to sell daily admission tickets from your website, you can enter the program description to use on the web form.

You're all set! Because there are no timed events to schedule, you can sell daily admission tickets right away.

Scheduled Programs: The Right Time and Place

You add scheduled programs to sell tickets for timed events. For example, if you offer a sea turtles exhibit that occurs three times a day on Mondays and Wednesdays, you would set up a sea turtles scheduled program and then schedule program events according to the days and times of each occurrence.

Adding a scheduled program in *Altru* is similar to a daily admissions program, but with more options. You select a location (or multiple locations), enter the capacity, and set your prices. To set prices, you can load a price list or assign specific price types and face prices. For members only events, you can specify which membership levels are allowed to purchase tickets. You can also choose whether the program requires registration to create preregistered events. We explain this type in the next section.

From the scheduled program record, you can assign fees, taxes, and discounts, and choose the ticket template to use for printing tickets. You can also edit program ticket prices, configure on-sale and pre-sale information, and add resources. If you plan to sell scheduled program tickets from your website, you can enter the program description to use on the web form.



Keep in Mind...

When you add a scheduled program, it is automatically available for all sales methods and the ticket on-sale availability is set to “Immediately.” You can change the available sales methods and on-sale time period on the On-sale tab of the program record. You can also configure pre-sale restrictions.

Preregistered Programs: Sign Up Now!

Preregistered programs are scheduled programs that require registration when tickets are purchased. These are useful if you offer workshops, camps, or other programs that have limited space and would benefit from an attendee roster. To add a preregistered program, you go through the same steps that you would for a regular scheduled program except that you also select **Requires registration**. The only time you can set a program to be preregistered is when you first create it. You cannot edit an existing program to make it preregistered or remove its registration requirement.

The screenshot shows the 'Add a scheduled program' dialog box with the following details:

- General Tab:**
 - Program details:** Name: 'A Special Evening with Master Artists', Description: 'Platinum members only!', Category: 'Special Exhibits'.
 - Locations:** Location: 'Special Exhibit Hall', Capacity: '250'. A checked icon indicates 'Program spans multiple locations'.
- Prices Tab:**
 - Load price list: 'Tour Groups'.
 - Table:

Price type	Face price
Adult	\$10.00
*	
 - Requires registration (highlighted with a red box).
 - Restrict ticket sales to these memberships:**

Membership program	Level	Tickets per transaction
President's Club	Platinum	5
*		

When you require registration, the Registration Information tab appears on the program record after you save. You can choose which questions and notices/disclaimers to make available during sales of preregistered program events. For example, you can use these to ask about the registrant's food allergies or t-shirt size, or to provide terms and conditions for participation. The registration information defined on the program is inherited by all of the program's scheduled events. However, you can also enter custom questions or notices/disclaimers for a single event. If you make a question required for an event, web users must enter this information before they can save an online registration. You cannot sell preregistered program events from Group Sales.

Schedule Events: Pencil Us In

After you create a scheduled program, the next step is to schedule the timed events that you'll sell tickets to. You can configure the event's start times and durations, as well as its recurrence. If a program only has a few event occurrences, it's probably easiest to enter the start times on the General tab. However, if you need to schedule multiple events with frequent start times throughout the day, it's quicker to enter these on the Start Time Pattern tab.

The screenshot shows a dialog box titled "Schedule events for Adult Art Class" with a close button (X) in the top right corner. The dialog has four tabs: "General", "Start Time Pattern", "Multiple Locations", and "Resources". The "General" tab is selected and contains the following sections:

- Event details:**
 - Name:
 - Description:
 - Multiple locations:
 - Capacity:
- Date recurrence:**
 - Recurrence:
 - Start date:
 - End date:
 - Days: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday, Saturday
- Time recurrence:**
 - Times per day:
 - From: To:
- Restrict ticket sales to these memberships:**

Membership program	Level	Tickets per transaction
+		

At the bottom right of the dialog, it says "Events to be scheduled: 35" and has "Save" and "Cancel" buttons.

Some events may require additional supplies, equipment, or staff members. If resources were assigned to the program record, these appear automatically on each scheduled event to ensure resources are not double-booked across events. Please note that any costs associated with a resource will not apply to the price of the ticket, unless you include it as an extra fee. If the program allows multiple locations for the events, you can choose which locations to use. For members only events, you can specify which membership levels are allowed to purchase tickets.

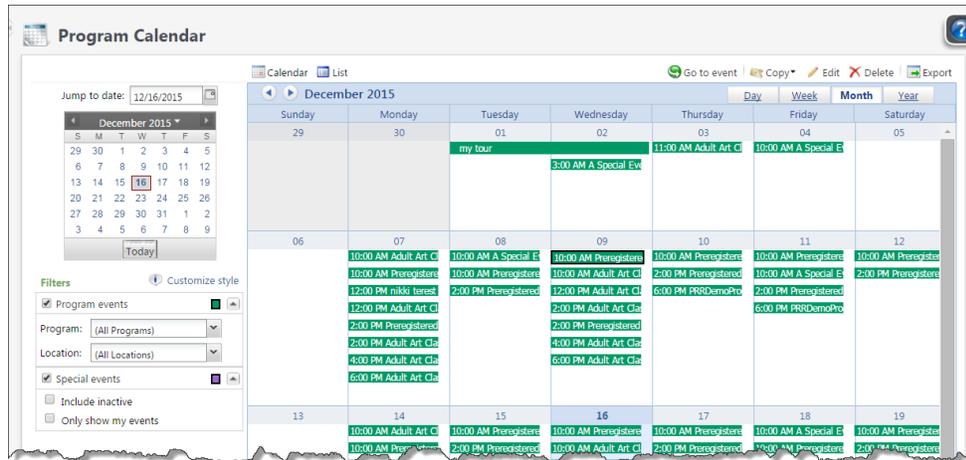
After you schedule events, they appear on the Calendar tab and the Event List tab of the program record. However, if there are conflicts for any of the events you attempted to schedule, you'll need to resolve these issues from the Conflicts tab. Typical conflicts include scheduling an event in the same location and time slot as a previously scheduled event.

You have multiple options for handling event conflicts. For example, you can address each conflict individually or you can completely undo a schedule run and start again. If you need to double-book events in the same location or time slot, you can disregard a conflict and force schedule an event. As you resolve conflicts, events are moved from the Conflicts tab to the Calendar and Event List tabs.

Program Calendar: What's Going on Around Here?

With the program calendar, you can quickly find out which scheduled programs and special events are taking place at your organization. You can view events in a calendar grid or list, by month, week, or day.

The calendar is also a hub for managing program events. You can edit and delete existing events, and create new ones. You can also copy a full day or week of events directly from the calendar— a real time saver! If you'd like to add a group of events to another calendar outside of *Altru*, you can export to an iCalendar (.ICS) file.



Tickets and Programs Backtrack

Before we move on to how you can manage merchandise in *Altru*, let's look back at some key concepts and important items to consider when it comes to tickets and programs.

- With *Altru*, you can sell tickets for different types of programs. Some organizations might only sell admission tickets, while others sell tickets for scheduled events and workshops that require registration.
- Daily admissions are the simplest form of program. They're designed for general admission organizations who sell untimed tickets throughout the day for admission to their facilities.
- To sell tickets for timed events like exhibits or movies, you add scheduled programs and then schedule the actual program events for the day and time of each occurrence.
- Preregistered programs are scheduled programs that require registration. These are helpful if you offer camps, workshops, or other programs that have limited space and would benefit from an attendee roster.

- The Ticket Sales Setup page provides an interactive checklist that guides you through each configuration task you need to complete before you can sell tickets. While you must complete some tasks, like adding locations and setting prices, other tasks are optional. For example, not all organizations will charge fees or taxes. The tasks your organization will complete are directly related to your business processes.
- After you add a tax to the system, it is active immediately and you can assign it to programs and any other items or services you sell. When an order is processed that involves such an item, the appropriate tax is automatically charged.
- Fees are additional charges that can be applied automatically at the point of sale. You can charge fees on a per item or per order basis, and the fees can be flat amounts or a percentage.
- Delivery methods determine how patrons receive their tickets. Common delivery methods include In person, Will call, Standard mail, and Overnight mail.
- Price types are used measure ticket sales. The same price type can have different prices for different programs and program events. For example, you can set different prices for adults, seniors, and children. You can add price types before you create price lists or on-the-fly when you create price lists.
- The way a customer purchases a ticket is called a sales method. By default, *Altru* provides the sales methods your organization will need, including Daily Sales, Advance Sales, Group Sales, and Online Sales.
- To help drive sales and increase incentives to purchase tickets, merchandise, and memberships, you can offer various promotions through *Altru*. Promotions include discounts, ticket combos, and membership promotions that encourage renewal, joining, and upgrading.
- Resources in *Altru* are people or items you need for program events or group reservations. You can set up supplies and equipment resources such as projectors, chairs, and workbooks, as well as staffing resources such as tour guides and birthday party leaders.

- ❑ The Print Setup page provides an interactive checklist that helps you configure your system to print tickets and sales documents. These tasks include adding workstations for each computer that will have a cash drawer or print tickets and sales documents; assigning printers; and choosing when to print documents for completed orders.
- ❑ The program calendar provides a central place to view all scheduled programs and special events for your organization. You can also manage scheduled events directly from the calendar.

For detailed information about the features discussed in this chapter, including all ticket sales setup processes and program-related tasks, see the *Tickets Guide* at <https://www.blackbaud.com/howto/altru.aspx>.

CHAPTER 4

Merchandise

"Good merchandise, even hidden, soon finds buyers."

— Titus Maccius Plautus

In This Chapter...

- ▶ *Departments: Dressed for Success*
- ▶ *Vendors: The Clothing Store*
- ▶ *Merchandise: The Clothes Make the Man*
- ▶ *Merchandise Inventory: What's in Stock?*
- ▶ *Inventory Audits: Count on Altru*
- ▶ *Merchandise Backtrack*

Which Hat Do You Wear?



The content in this chapter applies most directly to guest services managers. In this chapter, you learn about how to manage merchandise departments, vendors, and merchandise items in *Altru*.

Merchandise is a win-win situation. Your organization makes money, and your patrons leave with awesome souvenirs. In *Altru*, you can sell merchandise through both the Advance Sales and Daily Sales pages along with tickets, memberships, and event registrations. The items you sell, anything from clothing and toys to DVDs and ice cream, typically complement the theme of your organization.

Before you sell merchandise, you must set up your inventory in *Altru*. From *Merchandise*, you create departments and categories to organize your items; enter the vendors who supply your merchandise; add items to the system; and print labels to use as price tags. You can also run reports to check on merchandise sales and monitor inventory.

Departments: Dressed for Success

Think of your department as a dresser. The dresser is a way to organize your clothes. If you put your clothes in a dresser, you don't have to look under the bed, on the floor, or in another room to find them.

That is similar to how departments work in *Altru*. Before you can add merchandise, you need a place to put them. Not just a physical location in your store, but a way to keep items organized in *Altru*. For example, you may have Apparel and Media departments to organize the T-shirts and CDs that you sell.

Not only do departments organize your merchandise, but they also help with reporting. You can run the Merchandise Sales report to display total sales based on department. Merchandise is about sales, and if a department isn't doing well, you can either spruce it up with different items or remove the department entirely to make room for merchandise.

Also, departments provide a quick way to allow discounts. For example, you can decide that merchandise within the Art department should never be discounted.

Categories: Everything in Its Place

When you put your clothes in your dresser, you don't just put them anywhere, do you? Of course not! You put your socks in the sock drawer, T-shirts in the shirts drawer, and so on. Likewise in *Altru*, you don't just put merchandise in departments; you create categories to organize items within departments. For example, within your Apparel department, you can create categories for men's, women's, and children's clothing. Just like your sock drawer allows you to more quickly find a pair of socks, these categories make it easier to locate and manage your merchandise items.

Vendors: The Clothing Store

So you have a dresser and you know what goes in each drawer — now you need clothes to fill up those drawers. You head out to the clothing store to pick up shirts, pants, socks, etc.

In *Merchandise*, the vendor is your clothing store. You need a vendor to supply you with merchandise. When you add vendors, you enter information such as name and contact information, and you can also set up a primary contact for your favorite sales representative who always throws in that extra stuffed animal.

Merchandise: The Clothes Make the Man

It's best to have a plan before you start buying from vendors. You need to identify your organization's style. Are you a fashionista who will stuff your dresser with tons of clothes and accessories? Or, would your wardrobe be complete with only a pair of jeans and T-shirt? Or maybe you're a little of both types? Your style determines whether you add merchandise as single items or grouped items.

Single Merchandise Items: T-shirt and Jeans

Adding merchandise as single merchandise items works best for the T-shirt and jeans type of organization. Picture a simple gift shop, maybe even one that doubles as your front desk. Single items are best used for one-of-a-kind items, such as original paintings, or items you'll sell multiples of that only come in one variety, such as a CD.

When you add a single merchandise item, you create a merchandise record that contains all the information for that item. For example, the merchandise record for a CD would include the title, artist, vendor, and department.

Grouped Merchandise Items: Fashionista

Sophisticated gift shop operations are more like fashionistas. At this type of organization, the gift shop typically has its own space in the facility and carries one of everything in every shape, size, and color.

For these types of organizations, we suggest that you group related items within a shared merchandise record. To distinguish between the related items on a record, you define dimensions, such as shape, size, and color.

For example, your organization sells a whale T-shirt in small, medium, and large. What if this T-shirt also came in three colors? Creating records for every combination of size and color would require nine distinct merchandise records. That's a lot, particularly when you also sell nine types of tiger and lemur T-shirts! To avoid this madness, you can add one merchandise record for the T-shirt with dimensions for color and size. From the merchandise record, you can add entries for all the combinations of dimensions.

Add merchandise

Merchandise information

Name:

Description:

Image:  [Choose file](#) [Clear file](#)

Department:

Category:

Vendor:

Discounts allowed

Tax:

Merchandise details

Enter sales settings, or select "Merchandise includes dimensions." For multiple inventory items, enter dimensions. For example, to base T-shirt prices on size and color, enter "Size" and "Color." Then on the merchandise page, you can create inventory items with designated sizes and colors.

Merchandise includes dimensions

Dimensions
Color
Size
*

[Help](#) [Save](#) [Cancel](#)



Keep in Mind...

When you add new merchandise, make sure to define all possible dimensions you may need. After you save the merchandise record, you can edit the specifications for dimensions, but you can't add additional dimensions. For example, you can add another color to the Color dimension, but you can't add a new dimension, such as Sleeve length.

Merchandise Inventory: What's in Stock?

Inventory management is an important part of merchandise sales. Your organization will want to maintain the optimal amount of inventory of its best selling items. This requires careful reporting to track how specific merchandise items are selling and reordering at the right times. You can't sell it if you don't have it in stock!

As you receive merchandise from vendors, these items must be entered into the system. For each merchandise item, you create a merchandise record which contains information such as the current quantity in stock, inventory history, retail price vs. cost, and available discounts.



Keep in Mind...

As part of the **Ticket sales setup**, you configure discounts and taxes for merchandise sales. You can also access these configuration tasks directly from the Merchandise page. You will also need to configure which merchandise departments are eligible for discounts.

When you add merchandise items, the default tax is selected automatically, but you can choose another to apply. If the item is discountable, the Discounts tab on the merchandise record lists all discounts the item is eligible for based on its department.

Whale t-shirt

Name: Whale t-shirt Department: Apparel Discounts allowed: Yes
 Description: Category: shirts Tax rate: 7.50 %
 Status: Active Vendor: ABC Vendor

Inventory History Documentation Discounts

Inventory items (6) + Add Print labels Filters More ▾

SKU	Quan...	Item details	Retail price	Cost	Average...	Margin	Markup	Active
<input checked="" type="checkbox"/> SKU010000127	10	Whale t-shirt: Blue, Small	\$16.00	\$8.00	\$8.00	50.00 %	\$8.00	Yes
<input checked="" type="checkbox"/> SKU010000128	10	Whale t-shirt: Blue, Medium	\$16.00	\$8.00	\$8.00	50.00 %	\$8.00	Yes
<input checked="" type="checkbox"/> SKU010000129	10	Whale t-shirt: Blue, Large	\$16.00	\$8.00	\$8.00	50.00 %	\$8.00	Yes
<input checked="" type="checkbox"/> SKU010000133	10	Whale t-shirt: Red, Small	\$16.00	\$8.00	\$8.00	50.00 %	\$8.00	Yes
<input checked="" type="checkbox"/> SKU010000134	10	Whale t-shirt: Red, Medium	\$16.00	\$8.00	\$8.00	50.00 %	\$8.00	Yes
<input checked="" type="checkbox"/> SKU010000135	10	Whale t-shirt: Red, Large	\$16.00	\$8.00	\$8.00	50.00 %	\$8.00	Yes

Edit Change inventory Delete Mark inactive

On the Inventory tab, you can manage the inventory items available for a merchandise record. For single merchandise items, this tab will include only one item. For grouped merchandise records with dimensions, you can add specific inventory items for each variation. For example, remember the whale T-shirt that came in 2 colors and 3 sizes? On this tab, you would add inventory items for each combination of dimensions.

The History tab displays every update made to an item's inventory, such as new shipments and changes to the physical count. You can track inventory movement and find which items have losses from theft or staff errors. You can also monitor how your costs change over time to make smarter purchasing decisions.

Merchandise Batch Entry: Enter Inventory Like a Pro

When you receive one large shipment or several smaller ones from multiple vendors, entering new merchandise one item at a time can get tedious. Luckily, *Altru* has a batch for that! On the Merchandise page, click **Update inventory**. Using the Merchandise Receiving Batch template, you can scan the item's UPC barcode or type its SKU, and then enter other details and

dimensions. When you commit the batch, the inventory count on existing merchandise records is updated and new merchandise records are created for any items you haven't sold before. If you need to print labels for this group of merchandise, you can create an output selection that includes all records from the batch. We'll explain selections and batch entry in more detail in the Data Management chapter.



Did You Know?

Merchandise has multiple identifiers you can use to look up items for sales or inventory control. In addition to the UPC barcode that comes on most items, *Altru* assigns a stock-keeping unit (SKU) which is similar to a barcode but specific to your organization. You can also enter alternate lookup IDs on items. For example, you can store the ISBN for a book, or enter different barcodes for an item that comes from multiple distributors.

Merchandise Labels: Identification Please

Most merchandise items come with a printed UPC barcode you can scan during sales. For items that don't come with a barcode, you may need to print labels after you enter new inventory. You can print labels for a single merchandise item directly from its merchandise record. To save time, we recommend that you print labels in bulk after you enter a new shipment of merchandise. To print labels in bulk, go to the Merchandise page and click **Merchandise labels**.

When you print labels, you can choose a 1-column or 3-column format. The 1-column format can be printed on a traditional label printer. The 3-column format can be printed on an 8.5 x 11" sheet of paper. To print labels for the last shipment entered into inventory, you can use the output selection created during the last Merchandise Receiving Batch process, or you can create a new selection based on other criteria. Enter the quantity of labels you want to print for each item, and then click **Process**.

The Merchandise Labels page opens so you can preview the labels and change the format, if needed. If you are using *Internet Explorer* as your browser, you can print the labels directly from this page. Otherwise, you will need to export the file as a .PDF or *Word* document to print outside of *Altru*. If you need to print labels in a custom size, you can export the labels as a .CSV file to merge with a template in *Microsoft Word*.

Merchandise Reports: What's Selling?

As a guest services manager, it's your job to stay on top of merchandise sales trends and react appropriately. These reports can help:

Merchandise activity report. This report displays information about items you sold or have on hand during a given time period. We recommend that you run this report periodically to compare the sales of merchandise items and identify the slow movers. You can put the slow movers on clearance to make space for new items that might sell better.

Merchandise sales report. This report is more comprehensive. It displays revenue details including quantity sold, gross sales, discounts, refunds, net sales, percent of sales, cost of sales, margin, profit and percent of profit. You can define a time period and filter by department, sales method, and vendor. Use this report to average sales over time to ensure you have enough merchandise to meet future demand.

Inventory Audits: Count on Altru

Your organization will probably need to audit its inventory regularly, as mandated by financial accounting rules or tax regulations. In *Merchandise*, use these tools to help organize physical counts of your inventory:

Physical Count Worksheet. Print this handy worksheet to guide you through a manual count of each item in inventory. Although you can include a column for quantity on hand, we recommend leaving it off to ensure an unbiased count of units on the shelf.

Merchandise Physical Count Batch. After you finish the count, click **Update inventory** to use the Merchandise Physical Count batch to enter your results. Using the worksheet, you can scan each item's UPC barcode or type its SKU to enter it into the batch. Then, enter the quantity of items recorded on the worksheet. When you commit the batch, *Altru* updates the counts on each item's record.

Inventory report. This report displays your entire merchandise inventory as of the current date. Use it to verify that the quantities on hand now match the counts from the physical count worksheet.



Merchandise Backtrack

Before we move on to how to set up your financial structure in *Altru*, let's look back at items to consider about *Merchandise*.

- Before you can add merchandise, you must add departments, categories, and vendors.
- You can add merchandise with or without dimensions. When you use dimensions, you can have one merchandise record with multiple merchandise items. If you add merchandise without dimensions, you can have only one merchandise item per record.
- The merchandise record is where you manage merchandise items. It contains information including the current quantity in stock, inventory history, retail price vs. cost, and available discounts.
- Use the Merchandise Receiving Batch to enter lots of merchandise items at one time.
- After entering new inventory, you may need to print labels for merchandise items that come without a UPC barcode.
- Run merchandise reports regularly to monitor inventory and find your best selling items.

- ❑ You can use the Physical Count Worksheet, Merchandise Physical Count Batch, and Inventory report to complete inventory audits.

For detailed information about the features discussed in this chapter, including how to perform related tasks, see the *Merchandise Guide* available at <https://www.blackbaud.com/howto/altru.aspx>.

Merchandise

CHAPTER 5

Treasury

"A party without a cake is just a meeting."

— Julia Child

In This Chapter...

- ▶ *Treasury Setup: Chocolate Cream Pie for All!*
- ▶ *Banks: Team Butter or Shortening?*
- ▶ *Bank Accounts: Delicious Antioxidants*
- ▶ *Deposits: Nothing Low-fat Here*
- ▶ *Payment Transactions: Fill 'Er Up*
- ▶ *Chill Out, It's Time to Post!*
- ▶ *Treasury Backtrack*

Which Hat Do You Wear?



The content in this chapter applies most directly to accounting managers and any others that handle financial tasks at your organization. You'll learn the basics of setting up *Treasury* in order to deposit and post payments.

Treasury Setup: Chocolate Cream Pie for All!

Who's got a craving for something sweet? Since banking can be a little, *ahem...* bland, let's think of *Treasury* setup like making a yummy chocolate cream pie.

What comes to mind when you think about making a pie (besides the end result!)? Well, cooking always requires a bit of planning. For starters, you need a good crust to hold your pie filling. You also need filling that is firm enough! And of course, you want the right amount and type of chocolate. This pie offers intense flavor but is fairly simple to make.

Let's take a look at our ingredients to ensure we have everything we need before we begin.

- Banks: Team Butter or Shortening? — You need a crust to hold your pie together.
- Bank Accounts: Delicious Antioxidants — The type of chocolate you use can make or break any dessert. Find a good quality semi-sweet chocolate for this fine treat!
- Deposits: Noting Low-fat Here — You want a thick, rich cream for your pie filling, so make sure you have the right amount of heavy cream.
- Payment Transactions: Fill 'Er Up — Eggs, butter, sugar, and salt finish off your pie filling and fill the crust.
- Reports for posting — Refrigerate the pie to chill and set!



Banks: Team Butter or Shortening?

The first ingredient you need is your bank information. Consider this your pie crust! When you add a bank to your *Altru* database, you're really just designating an organization as a bank. Behind the scenes, *Altru* adds the "Bank" constituency to the organization record that you choose as your bank. A constituency specifies the relationship an organization has with your organization.

For example, to add Carolina Bank as a bank, you'll first need to add an organization record for Carolina Bank. Then go to the Manage Bank Accounts page, and click **Add a bank** under **Tasks**. Select Carolina Bank as the designated bank and enter a default routing number (which you can edit later if you need to).



Did You Know?

Let's take a moment to distinguish between your organization's bank and the banks your constituents use. In *Treasury*, you store bank and bank account information for your organization. To set up financial institution information for your constituents, such as direct debit transaction information, use the Constituent Financial Institutions page in *Constituents*.

Bank Accounts: Delicious Antioxidants

The pie crust is now in place and ready for the filling! The next step is to add the chocolately goodness of bank accounts. These are the accounts you'll use for your banking transactions such as deposits, EFTs, and credit card disbursements. When you set up accounts, you enter account information including the account name, account number, routing number, account type, and minimum balance limit. You can add bank accounts from the Manage Bank Accounts page.



Did You Know?

Bank accounts must contain a unique combination of routing number and account number. For example, accounts at different banks can have the same account number, but not the same routing number. Likewise, accounts at the same bank can have the same routing number, but not the same account numbers.

Deposits: Nothing Low-fat Here

To continue, you'll need to add heavy cream to your filling to make it smooth and rich. Which means you're ready to move on to deposits. The deposit process is typically part of the close drawer process for ticket sellers and guest services managers each day. During the close drawer process, a ticket seller calculates the cash, checks, and credit card receipts in the drawer at the end of a shift and submits the closed drawer for approval. The guest services manager then approves the closed drawer and creates a deposit for the payments. We describe the closed drawer process in more detail in the Sales chapter, but it's important to understand this basic workflow before you set up your deposit processes.

Create Deposit Templates

The first step in setting up deposit processes is to create deposit templates. Think of these as the measuring cup — you want to be sure to pour the correct amount of cream for your pie filling. Deposit templates define which revenue sources and payment methods you want to associate with a specific bank account.

For example, you can choose to deposit all cash and checks from front office sales into your checking account. To create a template, from *Treasury*, click **Review Deposits**. On the Deposit Templates tab, click **Add**.

You must add enough deposit templates to account for all combinations of sales methods and payment methods. We recommend that you create at least three deposit templates grouped like this:

Back office cash and checks. Select Cash and Checks for the payment methods and Back Office Revenue and Treasury Miscellaneous Payments as the revenue sources.

Front office cash and checks. Select Cash and Checks for the payment methods and Advance Sales, Daily Sales, and Group Sales as the revenue sources.

All credit cards payments. Select Credit Cards for the payment method and all types of revenue sources. Quick Tip: This will process include any debit card transactions too.

Run the Deposit Process

You'll probably want to run the deposit process daily or on the following business day. This would be part of the "clean-as-you-go" process so your cat doesn't eat the cream and butter left out on the counter.

From Treasury page, click **Create deposits**. (This link is also available on the Sales page.) This opens the Run deposit screen where you can select which deposit templates to run, the cutoff date for payments, and deposit date.

We recommend that you always select the payment date in the **Deposit date** field as it allows you to create separate deposits for activity that occurred over multiple days rather than grouping it all into a single deposit.

Run deposit process

Process name: Sales

Select the payment date cutoff

Payment dates up to: Today 12/5/2016

Select the deposits to be created

Deposit template	Bank account	Conflicting templates	Revenue sources	Payment methods
<input checked="" type="checkbox"/> Back Office Cash and Checks	Bank of SC checking		Back Office Revenue; Treasury Miscellaneous Payments	Cash; Check
<input checked="" type="checkbox"/> Credit Cards	Bank of SC checking		All revenue sources	American Express; Check (Debit) Card; Credit card; Diner's Club; Discover; MasterCard; Visa
<input checked="" type="checkbox"/> Front Office Cash and Checks	Bank of SC checking		Daily Sales; Advance Sales; Group Sales	Cash; Check

Possible number of deposits: 15

Assign the deposit date

Deposit date: Payment date mm/dd/yyyy

Help Start Cancel

Click **Start** to run the process. During processing, *Altru* links the payment transactions to bank accounts as defined by your deposit templates.

Daily Sales, Advance Sales, and Group Sales payments. The deposit pulls payments from all approved drawers. Payments in open, closed, or submitted drawers are excluded.

Back Office payments. The deposit picks up any payments that were added from a payment screen or through batch entry. Payments in uncommitted batches are excluded from this process.

Online Sales payments. The deposit includes all payments made on web forms.

Miscellaneous payments. The deposit pulls all miscellaneous payments entered from the *Treasury* or *Financials* pages.

When the deposit process is finished, the process page appears with details about the process including any payment transactions that failed to deposit. On the Recent Status tab, you can click **View report** to view the Deposit Summary report which displays summary and detailed information about the selected deposits, such as payment methods, bank account information, and any corrections made to the deposit. Use this information to prepare deposit slips for the bank.



Keep in Mind...

Depending on your organizational structure, you may want to set up a job schedule to run the deposit processes automatically each night. You can set up the exact time and frequency for the deposit process to run. The process will automatically include all deposit templates you configured. After the job schedule is up and running, you can refer back to the Recent Status and History tabs on this page to view details about the most recent processes.

Payment Transactions: Fill 'Er Up

Now that you've got your banking set up to accept deposits, you need to enter your payments. This is when you'll want to mix the eggs, butter, sugar, and salt into the filling and then pour it into the crust.

For information about the different types of revenue you can work with, review the Revenue chapter. This chapter also addresses setting up direct debits and credit card processes.

We're getting close to dessert time!

Chill Out, It's Time to Post

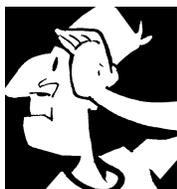
After you start adding transactions in *Altru*, you'll need to post that information to your general ledger. If you use an external financial system, you can do this by comparing totals in the Deposit Report and Total Revenue Report. When the totals match, create a manual journal entry to post to your general ledger.



Hold Up!

If you use the *General Ledger* module provided in *Altru*, your posting process may include different steps. To read more about posting to *General Ledger*, see the *Revenue Guide* at <https://www.blackbaud.com/files/support/guides/ac/revenue.pdf>.

Now, in terms of your chocolate pie, it looks like you added and mixed all the necessary ingredients to hold the filling together. You're all set. It's time to refrigerate the pie until firm (at least four hours!). When you're ready, serve it chilled with a few chocolate sprinkles on top!



Treasury Backtrack

Before we move on to how you manage your fundraising efforts through *Altru*, let's review the banking concepts we discussed in this chapter.

- You need to add organization records for your banks and create accounts for banking transactions such as deposits, EFTs, and credit card disbursements.
- Deposit templates define which revenue sources and payment methods you want to associate with a specific bank account. You must add enough deposit templates to account for all combinations of sales methods and payment methods used in your system.
- When you run the deposit process, *Altru* links the payment transactions to bank accounts as defined by your deposit templates.
- After you enter payment transactions, you can use information from the Deposit Report and Total Revenue Report to post transactions to your external financial system.

For detailed information about the features discussed in this chapter, including how to perform related tasks, see the *Treasury Guide* available at <https://www.blackbaud.com/howto/altru.aspx>.

CHAPTER 6

Fundraising

"Fundraising is the gentle art of teaching the joy of giving."

– Hank Rosso

In This Chapter...

- ▶ *Fundraising Hierarchies: Direct Traffic to Your Bottom Line*
- ▶ *Designation Information: Running on the Freeway*
- ▶ *Appeals and Appeal Mailings: Any Number of Ways to Say "Please"*
- ▶ *Fundraising Tools: Fill Your Arsenal*
- ▶ *Fundraising Backtrack*

Which Hat Do You Wear?



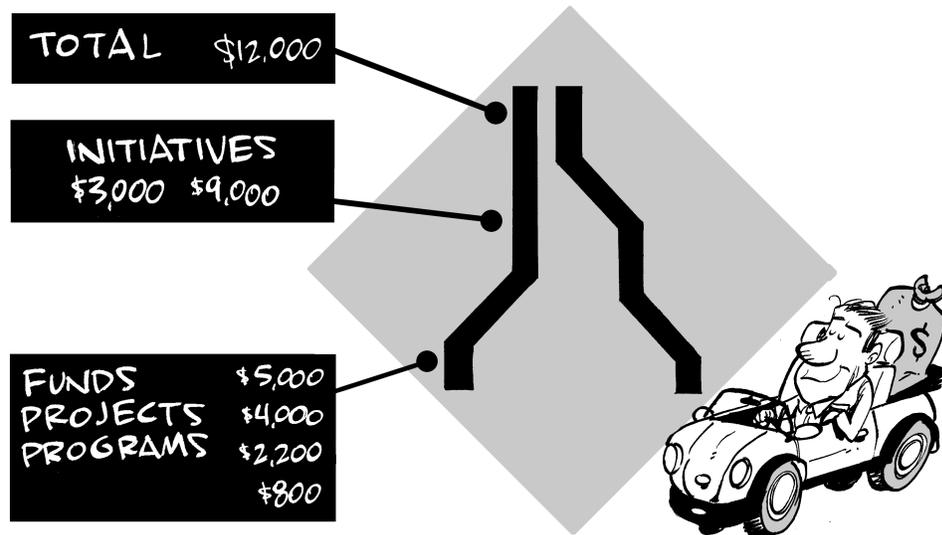
The content in this chapter applies most directly to data entry personnel, directors, and users who manage fundraising efforts. In this chapter, you learn about the various types of fundraising designations. You also learn about using solicitations (also known as "appeals") and tools such as benefits and the Fundraising Effectiveness Project survey to enhance your efforts.

Now that you've made yourself at home in the program and we've covered the basics, let's get down to brass tacks. Your organization is using *Altru* to raise and track donations toward your mission. We'll talk later about constituent relationship management, which is a big pillar in effective fundraising, but you can't successfully accept and use donations from constituents without first laying down a strong foundation for your fundraising efforts. From *Fundraising*, you'll set up your fundraising efforts and specify where and how you'll apply the donations you receive.

Fundraising Hierarchies: Direct Traffic to Your Bottom Line

When you add transactions such as donations, pledges, or recurring gifts to the database, you must specify how you plan to use the revenue received. For example, a constituent may request you use a donation for a specific purpose, or perhaps the gift is in response to a solicitation used to raise funds for a specific cause.

In *Altru*, you apply the funds that you raise to causes or purposes called *designations*. To help direct the flow of revenue, you use fundraising hierarchies to manage your designations. Think of a fundraising hierarchy as a freeway, with a separate lane for each designation and all lanes merging together with the overall objective of the designations as the ultimate destination.



To identify how you intend to use the funds you raise, you use five different types of designations.

Total: The Destination

When you first add a fundraising hierarchy to the database, you create its Total designation. The Total designation indicates the overall objective of the hierarchy. This is where all the funds raised through the designations in the hierarchy ultimately go toward. In terms of your freeway, this is the big destination, the End of the Road. This is where all your drivers (or transactions) on your Hierarchy Freeway end up. For example, say your organization constructs a new exhibition hall. This Total designation compiles all designations that collect revenue toward the development, construction, and ongoing maintenance of the new building.



Keep in Mind...

Much like how a freeway provides on-ramps so drivers can enter, you can apply a revenue transaction toward any type of designation in your hierarchy. However, while all revenue applied toward designations in a hierarchy funnel into the Total, you should apply transactions toward more specific designations to help identify how you intend to use the revenue.

Initiatives: Merging Lanes

The next level in your fundraising hierarchy is the Initiative designations. Think of these as the lanes on your freeway that merge into the Total designation. By breaking down the revenue into these smaller designations, you can help control the flow of revenue. Similar to how a freeway may have lanes designated for passing traffic and high-occupancy vehicle carpoolers, with Initiatives, you can start to divide your designations by the intent of revenue. Is this revenue for an internal purpose, such as Operating Costs? Or is it used for investment purposes, such as an Endowment? Fundraising hierarchies provide flexibility so you can build them to best meet the needs of your organization. To classify how the revenue you receive is used, your hierarchy can include as many Initiative designations as necessary.

Funds, Projects, and Programs: Driving with Purpose

The third level of your hierarchy has multiple designations for very specific purposes—your one-time expenses, your ongoing expenses, and your goals and tributes. In terms of your freeway, think of a toll plaza with multiple lanes at the beginning of a turnpike. Much like how a toll plaza may divide drivers into specific lanes such as “Cash Only,” “EZ Pass,” and “Commercial Trucks,” these designations break revenue down by Funds, Projects, and Programs.

Funds. Fund designations identify funds raised toward specific goals or as tributes. Examples of Funds include a Scholarship Fund or Memorial Fund.

Projects. Project designations identify funds raised toward one-time expenses such as the construction of a new building.

Programs. Program designations identify funds raised toward ongoing expenses such as research efforts or series of instructional classes.

Your fundraising hierarchy can include as many Fund, Project, and Program designations as necessary for your overall objective. To help clarify, Funds, Projects and Programs are just different categories to help us group and report on these third level designations. We recommend adding revenue to Funds, Projects and Programs, and using Initiatives and Total for reporting.

Designation Information: Running on the Freeway

Now that you’ve built your fundraising hierarchy, stand back, look, and realize that your freeway doubles as a track for a marathon run. Because isn’t fundraising really like one long decathlon? Racing toward one goal, just to have another to run toward after you reach that milestone? And, at the end of the day, when you’ve had a successful fundraising effort where you’ve raised the revenue necessary to accomplish your ultimate goals, don’t you feel a little like you’ve been awarded the title “World’s Greatest Athlete Fundraiser”?

After you create a fundraising hierarchy, you can manage each of its designations separately. After all, each designation plays a part in the success of the overall hierarchy, just like how winning a decathlon hinges on your performance during each of its events. When you add a designation, you enter names for both internal and external, or public, audiences. For example, around the office, you may refer to a fund as the “Annual Fund” in a sort of shorthand; however, in external marketing and communications you refer to it as the “Annual Fund For Excellence in Education.”

To indicate where a designation falls in the hierarchy, you select its type when you add it to the database. You can also enter any report codes to help identify the designation in analysis and, for a designation associated with a specific date range, when use of the designation begins and ends.

After you add the designation, you can continue to build on this information. For example, you can assign goals for the designation to help track expectations and help motivate fundraisers. You can also add and manage notes or additional information about the designation. You do all this from the designation record.

Goals: The Finish Line

If I was to ever temporarily lose my senses and sign up for a decathlon, I imagine that, around midway through each event, I’d be much like a child on a long car trip: “Are we THERE yet?!” I’m pretty sure my participation would end with my either crossing the finish line or passing out from pure exhaustion. (Probably the latter; but goals are still important to set, so I’d likely at least set a goal for how far I’d like to get before succumbing to exhaustion). Just as with a race, it’s important to set goals for your designation and determine just where “THERE” is.

From the Goals tab on a designation record, you can add and manage the financial goals of the designation. Your goal should be a definitive monetary amount. Regardless of whether you raise the set amount, the goal provides motivation for the fundraisers and solicitors. If an initial fundraising effort does not raise the amount toward the designation, your solicitors are likely to continue to find new ways to drum up donations and revenue toward the goal.

When you set goals, you should consider several factors to help keep your goals challenging yet realistic:

- Determine exactly what you are raising funds for, such as a new building or everyday operating expenses.
- Compare previous years' fundraising efforts to determine areas to improve or any increase in expenses related to efforts over the years.
- Determine the amount of time your organization has to raise funds toward the goal.
- Account for any expenses related to the fundraising effort, such as for supplies for a related fundraising event (or the cost of *Altru* to improve your everyday fundraising ability).

If you set realistic expectations, a specific monetary amount also enables your organization to define tasks and efforts to reach your goal. Goals are required to run fundraising reports which help you gauge and compare performance with other fundraising efforts. You can also use the goals as the basis of a key performance indicator (KPI, we'll talk more about them when we discuss *Analysis*) to determine the effectiveness of your fundraising toward the designation.

Hierarchy: Racing as a Team

Now, a decathlon with a relay race element to it I might be able to sign up for ... as long as my part involved a Nintendo Wii, a *Super Mario Bros.* game, and central air conditioning. Even then, I'd want to be aware of the other events going on in the decathlon and my relay team's performance in each. From the Hierarchy tab under Total designation, you can view the other designations that help the designation support the overall hierarchy. From an Initiative or Total designation, you can add and manage the lower tiered designations such as Funds or Projects. Think of it as the racing sheet for your relay team.

Documentation: Decathlon Scrapbook

As you prepare for and complete your triumphant run in the decathlon, you might collect souvenirs to track the event for all posterity. You might keep a spreadsheet of your run times leading up to the event, your race number, a screenshot of a competitor's blog post about his own preparation, a newspaper clipping of your rank across the finish line, the snapshot of your photo finish win against the blogger, and on and on.

You might find similar items of interest to record about your fundraising effort. For example, the local newspaper runs an article about the effort and the cause it benefits, or a solicitor posts on her blog about successfully meeting her goal. If your organization produces marketing material such as a brochure or website to promote giving toward the designation, you can attach a copy or link to the content. You can also track additional information, such as notes from a retrospective after the end of the effort, to determine what went well and where to improve. From a designation's record, you can track this information on the Documentation tab.

Appeals and Appeal Mailings: Any Number of Ways to Say "Please"

So you've built your fundraising efforts as hierarchies using designations as the building blocks. After you develop your constituent database (we'll talk about constituents in the next chapter), how do you ask them to support these fundraising efforts? That's where appeals come in. From *Marketing and Communications*, you can add and manage your appeals. An appeal is how you reach out to your constituents with an ask. An appeal can be any number of ways to say "please":

- A communication effort through a mailing or an email message
- A fundraising event held in support of a specific cause
- A phonathon effort to generate donations

- Any similar method of reaching out and asking for donations... Be creative!



Did You Know?

From *Administration*, your organization can maintain a list of the types, or categories, of appeals you use, such as mailings, events, and phonathons. When you add an appeal, we recommend you select its category to help analyze and determine which categories of appeals work better than others.

When you add an appeal, you enter its start and end dates. Your appeals can be for a specific time period, such as annually for a mailing or over a weekend for an event. You can also have appeals with an indefinite time period and no end date, such as face-to-face interactions, tributes, or the spontaneous “unsolicited” donation.

Much like you did for your designations, you can set a goal for an appeal. You can also track any media or other documentation about the appeal.



Did You Know?

While not required, we recommend you select the appeal associated with each donation when you add the payment transaction. The appeal provides insight into why the constituent felt compelled to donate. By tracking which appeal resulted in a donation, you can analyze the effectiveness of your appeals and determine which have a greater rate of success.

To finally put my dusty Psychology degree to use, “Effective communication is the key to all healthy relationships.” You obviously rely on your constituents to help fund your mission, so you’ll need to let them know about upcoming activities and ask for donations. You can reach out to constituents with an ask through many different appeals. Appeal communications, such as mailings and email blasts, are a common method to ask constituents for donations toward fundraising efforts. From *Marketing and Communications*, you can manage your appeal mailings on their own or in context of their appeals.

Since you use *Altru* to raise funds for your organization, the appeal mailing will be one of your primary communications (if not *the* primary communication). Ideally, you should include an ask with every communication to help increase your return on investment. You can use appeal mailings to create everything from standard appeal cards to newsletters; all that changes is the content you include with the communication. Since they play such a pivotal role in your fundraising efforts, *Altru* enables you to manage all aspects of your appeal mailings, from planning to creation and activation to response tracking and analysis. As you create your appeal mailings, there are several things to consider, both for the recipients and for your own analysis and management:

- Which appeal does the mailing support?
- What’s your budget for the mailing?
- How many recipients do you want to include?
- Is there anyone you should exclude, such as based on giving history or recent communications?
- Since the purpose of appeal mailings is to generate revenue, determine some estimates or goals of the average gift amount and response rate you expect to get out of the appeal mailing.

After you activate, or send out, an appeal mailing, you can indicate when donations are made in response to the communication as you add the payments to the database. *Altru* uses this data to track the mailing's response information, including the total number of responders and donations you receive, the average and total gift amounts, and the overall response rate. To help track the effectiveness of the mailing, the program also automatically creates key performance indicators (KPIs) for the mailing, with the estimated response rate and average gift amount as the goals to meet.



Did You Know?

To make data entry quicker and easier, consider adding finder numbers to your appeal and membership renewal letters. These unique 5 digit numbers are usually printed at the bottom of the reply card that's returned with a donation or payment. When you enter a finder number into a payment or batch, constituent, designation, and marketing fields automatically populate for you. And even better yet, if you format the finder number on your mailings as barcode font, you can scan the number which helps reduce data entry errors. Finder numbers are also useful because they can match a transaction to a particular mailing, which helps with tracking and reporting on the mailing's performance.

Communication Planning: Think before You Speak

There are a lot of items to consider before you send out an appeal mailing. To build successful relationships with your constituents, you should take time to plan your appeal communications. Maybe this is something you do on an annual basis, such as at the end of the year in preparation for the upcoming year, and then continue to manage and adjust as the year progresses. When it comes to planning, it's best to take the journalistic approach and determine the Who, What, When, Where, and How of your communication efforts.



It can take a little time and effort to figure these out, but they all play an important role in effective communication. You can use *Altru* to help determine and incorporate these factors for your communications as well.

The Who

Each communication has a unique audience. For an appeal communication, you may want to reach out to specific constituents, constituents with shared characteristics, or a mixture of both. While it's tempting to just send out an appeal communication to all the constituents in your database to ask for donations, that's probably not the best path to take. Not only would that overwhelm your constituents, but it may also make those constituents question where their donations go — toward your mission, or toward your communication efforts?

Rather than just include every constituent, plan who you're really trying to target with each communication. Maybe you want to reach out to a select group of constituents who share common characteristics such as giving history, event attendance, or constituency. Using queries in the Information Library, you can group constituents into selections based on shared criteria, and you can then include the appropriate selections in each communication (we'll talk more about the Information Library later).



Did You Know?

When you create an appeal communication, *Altru* automatically provides selections based on constituency and donor status that you can then select to include.

After you select the types of constituents to include in an appeal mailing, you can then select who to *exclude*. For example, regardless of whether a constituent meets the criteria of the selection included in the communication, you'll still want to honor any requests of Do Not Mail (*Altru* calls these requests "solicit codes"). To save costs and avoid redundancy, you can also exclude constituents on other criteria, such as whether they recently received a similar communication or share a household with another constituent in the communication.

The What

After you determine who you're communicating with, you can customize your message to meet the needs and interests of that specific audience. When you target content toward constituents, such as based on their previous activity or known interests, they are more likely to feel a connection to your organization and respond positively. What you include in a communication — its content, its look and feel, its personalized information — is a big part of building that positive relationship and connection with your constituents.



Did You Know?

From *Marketing and Communications*, your organization can maintain “ask ladders.” Ask ladders help determine the appropriate donation amounts to suggest to appeal mailing recipients based on their giving history information. *Altru* automatically provides an ask ladder based on general fundraising standards. However, your organization can create and maintain additional ask ladders to better fit your needs.

When you create and design content for your communications, you can use merge fields to address each recipient individually and customize the message with personal information such as giving history or recent activity. You can also use addressees and name formats to determine how to best refer to each constituent in your communications. When *Altru* generates the output of your communication, it automatically replaces these merge fields with information from the database specific to each recipient.

The When

It's important to be conscious of other activities going on at your organization or in your community when you plan your communications. For example, you might want to plan to send an appeal mailing so it doesn't get lost in additional mailings such as marketing efforts for a fundraising event. Or maybe you can plan an art-themed appeal mailing to coincide with that art festival downtown.

Maybe you already do some communication planning with a desktop calendar, in Microsoft *Outlook*, or on an online *Google* calendar. Unfortunately, other people at your organization may not be able to easily access this calendar, so it may be difficult to see the big picture of activities at your organization and plan accordingly. *Altru* provides an organization calendar so you can view planned activities at your organization and track community events and holidays. From *Marketing and Communications*, you can access this calendar to help quickly view and manage your appeal mailings.

Planning calendar

Jump to date: 8/2/2011

Filters: [Customize style](#)

- Appeal mailings
- Active constituencies
- Donor status
- Selections
- Merged selections

Include mailings with no selections

Include tasks

- Events
- Program events
- Reservations
- Calendar items
- Marketing efforts

Status:

August 2011

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
31	01	02	03	04	05	06
	Back to School	Harvest Festival 2:28 pm Garden				
07	08	09	10	11	12	13
14	15	16	17	18	19	20
	2011 Camp Kids					
21	22	23	24	25	26	27
28	29	30	31	01	02	03
			8:00 am AAA Co			



Did You Know?

From the organization calendar, you can quickly add appeal mailings as placeholders when you plan communications for over a long period of time. When you add an appeal mailing through the calendar, you have to define only its name, mail date, and appeal. You can later edit the appeal mailing through *Marketing and Communications* to flesh out additional details such as recipients, exclusions, and package.

The Where and the How

Where and how you send your communications go hand in hand. The method, or “channel,” you use to communicate can also impact the content (the What). For example, a communication you send through the mail requires additional considerations, such as paper stock and page size, than a communication you send as an email message. Email may be quick and cost-effective, but a nicely produced mailing may have more emotional impact. Take the time to analyze the effectiveness of your channels and create communications that are geared toward each. Also, you can track how each constituent prefers to communicate and configure communications to honor these preferences.



Did You Know?

While email can be a cost-effective method of communication, you still want to be aware of the amount and frequency of the email messages you send a constituent. If their in-boxes seem to constantly have a new message from your organization, some constituents might start to see your communications as spam. They might even select to opt out of your email messages completely!

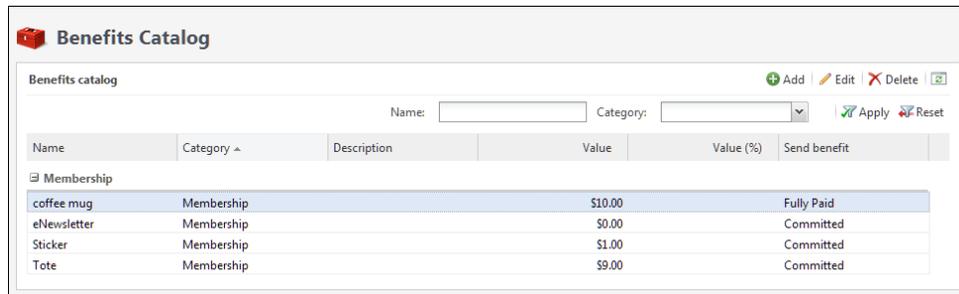
After you finalize how you’re going to communicate, it’s good to determine where to deliver your message. For example, you might have multiple email addresses for a constituent, or maybe a constituent uses a vacation home three months out of the year. *Altru* enables you to configure your communications to best reach your constituents. For example, you can track the primary address to use for each channel and select whether to include seasonal addresses.

Fundraising Tools: Fill Your Arsenal

To help you succeed at your fundraising efforts, *Altru* provides additional tools to help increase donations and determine effectiveness. While you can use your hierarchies and appeals to set up efforts and drum up donations, we recommend you take advantage of these tools to take your fundraising further.

Benefits Catalog: Perks from the Gift Closet

To help motivate constituents to donate toward a fundraising effort or participate in a membership program, you might need to sweeten the pot. Sure, there's the inherent esteem-boost and good karma in supporting a worthy cause one believes in. But sometimes, just sometimes, what a constituent really wants is a swanky T-shirt or bumper sticker in exchange for donating their hard-earned cash. From *Fundraising*, you can manage the items available through the Benefits Catalog.



The screenshot shows the 'Benefits Catalog' interface. At the top, there are buttons for 'Add', 'Edit', 'Delete', and a refresh icon. Below these are input fields for 'Name' and 'Category', along with 'Apply' and 'Reset' buttons. The main content is a table with the following data:

Name	Category	Description	Value	Value (%)	Send benefit
Membership					
coffee mug	Membership		\$10.00		Fully Paid
eNewsletter	Membership		\$0.00		Committed
Sticker	Membership		\$1.00		Committed
Tote	Membership		\$9.00		Committed

When you add a benefit to the catalog, you can establish its worth or value. The value can be based on a monetary amount such as the cost of a t-shirt, or on a percentage of the revenue transaction amount associated with the benefit. You can also select whether a constituent who pledges to your organization receives the benefit when they make the commitment or after they pay its installments in full.



Hold Up!

When you associate a payment with a donation or other charitable gift, such as through the appeal used to solicit the transaction, you should always deduct the benefit's value from the receipt amount. The receipt amount should reflect only the tax-deductible portion of the revenue transaction.

Throughout the program, you can associate benefits as perks to help improve your fundraising numbers and membership activity. For example, you can use benefits to improve response to an appeal or an incentive for constituents to climb a level in a recognition or membership program.



Fundraising Backtrack

Before we move on to how you can build and maintain your membership programs through *Altru*, let's look back at items to consider about developing and maintaining your fundraising efforts.

- Designations indicate how your organization plans to use money it receives.
- You manage your designations through a fundraising hierarchy. With a hierarchy, you can use multiple designations to raise funds and funnel revenue toward a specific purpose. The hierarchy is the overall objective of the designations it includes.
- By default, *Altru* provides five types of designations: Total, Initiative, Project, Program, and Fund. In the hierarchy, the Project, Program, and Fund designations flow into the Initiative designations, which funnel into the Total designation.
- When you set goals for your designations, keep your goals challenging yet realistic.
- An appeal indicates how you reach out to your constituents with an ask. Your organization can maintain a list of the categories of appeals you use, such as mailings, events, and phonathons. When you add an appeal, you should select its category to help analyze and determine which categories of appeals work better than others.
- Appeal communications, such as mailings and email blasts, are a common method to ask constituents for donations toward fundraising efforts.

- To build successful relationships with your constituents, take time to plan your appeal communications. When it comes to planning, it's best to take the journalistic approach and determine the Who, What, When, Where, and How of your communication efforts.
- To include suggested donation amounts in your appeal mailings, you can maintain ask ladders, which determine the appropriate ask amounts based on giving history information. *Altru* automatically provides an ask ladder, based on general fundraising standards. However, your organization can create and maintain additional ask ladders to better fit your needs.
- When you associate a payment with a donation or other charitable gift, deduct the benefit's value from the receipt amount. The receipt amount should reflect only the tax-deductible portion of the revenue transaction.

For detailed information about the features discussed in this chapter, including how to perform related tasks, see the *Fundraising Guide* and *Communications Guide* available at <https://www.blackbaud.com/howto/altru.aspx>.

CHAPTER 7

Memberships

"Please accept my resignation. I don't want to belong to any club that will accept people like me as a member."

— Groucho Marx

In This Chapter...

- ▶ *Memberships: Build Your Following*
- ▶ *Get Members: You Really Like Me!*
- ▶ *Retain Members: You Still Really Like Me, Right?*
- ▶ *Get Members Again: We Really Want You Back!*
- ▶ *Memberships Backtrack*

Which Hat Do You Wear?



The content in this chapter applies most directly to membership managers, guest services managers, and any user who works with memberships on a regular basis. In this chapter, you learn about key membership concepts, including the various components used to build your core membership offering in *Altru*. You also learn about benefits, add-ons, discounts, promotions, renewal notices, membership cards, and much more.

When a person becomes a member of your organization, it means they identify with you and your mission. Or they like visiting, and a membership is the best value for them. Or they just **really** wanted that snazzy coffee mug or tote bag that came with the membership.

No matter their reason for joining, members are vital to your organization and form the core of your giving community. Offering memberships that build affinity and cultivate long-term relationships is key. Memberships are like a bridge you build to move people from the land of anonymous patrons to the land of known constituents. After they become members and are known constituents, you can focus on growing your relationship by continuing to offer the right benefits, send the right messages, and engage them in ways that result in donations and fundraising support.



Altru provides the tools you need to build and manage membership programs that turn your anonymous patrons into known constituents. Let's take a closer look...

Memberships: Build Your Following

You can set up memberships in *Altru* to meet just about any need your organization has. From *Memberships*, you have everything you need to manage your memberships programs and their members. Think of it as your local convenience store, except this is for memberships and not Big Gulps, chips, and overdone hot dogs. At this store you can create membership programs of various types based on duration and payments. You can review pretty graphs and charts, or *widgets*, to track revenue and activity such as new memberships, renewals, and upgrades. You can also run reports, print membership cards, and set up renewal notices. With the convenience of *Memberships*, you won't need to go anywhere else again!

Membership Program: It All Starts Here

So, what is a membership program? Well, it's the first building block for your membership offerings. You start with a membership program and add other components like levels and terms to determine the duration and benefits included in the memberships you sell. In *Altru*, a single or "core" membership program is all you need. This single program provides a clear upgrade path for members and enables consolidated reporting.



Keep in Mind...

Your membership programs should build net revenue and increase retention, while staying true to your mission.

When you add a membership program, *Altru* walks you through all the decisions you need to make to set up the program.

What kind of membership program is this?

- Annual - For memberships of a specified length of time with an expiration date, such as annual membership programs and student membership programs
- Recurring/Sustaining - For memberships with no expiration date as long as a set amount is paid on a regular, specified basis such as \$10 a month
- Lifetime - For memberships with no expiration date as long as a specified amount is paid in full within a specified timeframe

How do people obtain this membership?

- Dues based - People pay for membership levels with dues
- Reported as membership revenue
- Posts to GL accounts specifically for membership
- Contributions based - People are awarded membership levels based on their contributions
- Reported as contributions revenue
- Posts to the same GL accounts as donations
- Both ways - Some levels are purchased and some are awarded

How many membership terms does your program have?

- One term year(s)
- Multiple terms

Do we have it right so far?

Based on the options you selected, your membership program looks like this:

	AMOUNT
XXXX	\$

- Define one term (such as 1 year...)
- Define any number of levels
- Define single amount

But before you jump in, it might be worthwhile to take time to understand how these basic components of a membership program work together:

- Types
- Terms
- Levels
- Add-ons, benefits, discounts, and promotions
- Renewal windows and expiration dates

Types: Pick Your Flavor

When you add a membership program, one of your first decisions will be what kind of program to add. There are three types of membership programs to choose from, and you'll base this selection on the duration of your memberships.

- Annual programs are for memberships of a specific duration with an expiration date.
- Recurring, or sustaining, programs are for memberships with no expiration date, as long as the member pays a set amount on a recurring basis.
- Lifetime programs are for memberships with no expiration date, as long as the member pays a substantial amount.

We'll discuss these types further in just a bit, but another consideration is how members pay for the membership. You can select to award memberships or levels based on membership dues, a member's charitable contributions above a specific level, or a bit of both to encourage additional giving as well as membership activity.

- With a dues-based program, members must make payments directly toward their memberships, and you must account for this revenue as related specifically to memberships.
- With a contributions-based program, members are awarded memberships or levels based on their charitable giving to your organization, and you must account for this revenue like you do donations.
- With a "hybrid" program based on both dues and contributions, you can base some levels on dues and others on contributions. For example, you can have lower levels based on membership dues of \$40, \$50, and \$60 and then award higher "Society" levels based on cumulative contributions of \$125 and \$500. The Society levels may be more like giving societies than your standard memberships.

Annual: Not Just Once a Year

An annual program is probably what you think of as the standard membership program. If you want memberships that expire after a specific length of time, such as a student membership program or memberships that require renewals every year, then you want an annual membership program. When you set up an annual membership program, you can select whether it has one term or multiple terms, each for a specific number of months or years. (So yes, in *Altru*, an “annual” membership can last longer—or shorter—than a year!) We’ll talk more in-depth about terms and expiration dates later, but for now, if you want them, know that an annual membership program is what you want.

Recurring/Sustaining: Put Your Members on Repeat

Recurring, or sustaining, programs are all about ongoing loyalty and devotion. These programs are typically open-ended with no expiration date and members agree to pay a set amount on a regular interval to keep their memberships active. For example, you can have a program where members agree to “adopt” an animal by paying a set amount each month by credit card.

When you set up a recurring program, you can select how often members must make payments—annually (and here we actually mean yearly!), semi-annually, quarterly, or monthly—and price levels differently based on how often a member makes a payment. For example, say you set up a recurring program with both annual and monthly payment intervals. To encourage longer-term memberships, you could price the levels so the cost of annual payments saves members money compared to 12 monthly payments.

Lifetime: For Those Major Fans with No Fear of Commitment

Lifetime programs—talk about commitment! If you want members to pay a substantial amount in exchange for memberships that never expire, create a lifetime membership program. For example, you might use this program with major donors, as just one way they can show support for your organization.

Terms: What's This Gonna Cost?

When you add an annual membership program, you designate the terms for the program. A membership program may have a single term or multiple terms. The terms determine the duration and price of a membership. You can set up term durations based on months or years, and the price you charge for each is entirely up to you. For example, you can add a program with multiple terms of six months, one year, and three years, and then price a level of the program at \$75, \$125, or \$350 respectively.



Keep in Mind...

When you first add a membership program, if you make it a single term, you cannot later change it to use multiple terms. For that reason, we recommend that you always choose multiple terms so you can add terms in the future.

Levels: The Heart of Your Memberships

When you add a membership program, you set up its levels, which enable you to offer different memberships and benefits to its members based on price point. When a person buys a membership, they purchase a specific “level” of membership, such as Student, Individual, or Family.



Hold Up!

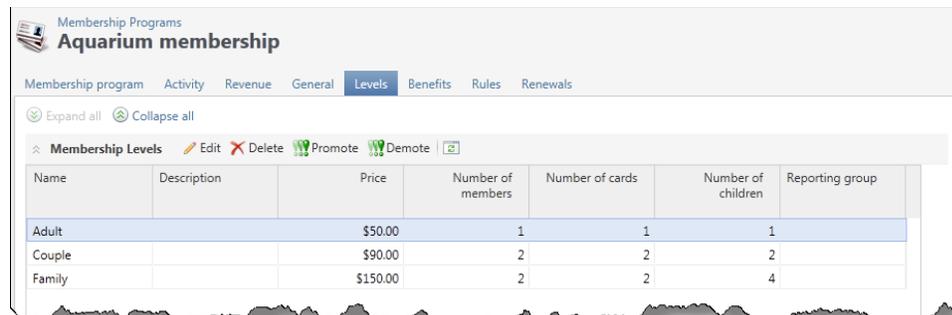
When you edit a membership program, there’s an option to **Allow multiple memberships**. If you allow multiple memberships, a member can belong to more than one level at a time. We recommend you not select this option for your core membership program. For example, you don’t want a member to have active Individual and Family memberships at the same time. That’s just bad mojo. Instead, you want a clear membership history that starts with a single join date and progresses down the road to renewals and upgrades. We’ll revisit this option again later when we talk about multiple membership programs.

You can use levels to classify members based on their participation at your organization and then analyze their involvement based on their upgrade and downgrade activity. For example, when a college student graduates, they may upgrade their Student membership to an Individual membership. Later, when they get married and have kids, they can upgrade to a Family membership. The differences between all these levels would be price; the number of members, membership cards, and children allowed per membership; level-specific benefits and add-ons; and the reporting groups.

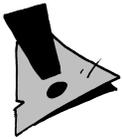
We’ll talk more about benefits, add-ons, and reporting groups in a bit, but first, let’s talk about the all-important upgrade path.

Upgrade Path: Which Way Is Up?!

The differences in your membership levels should provide a logical upgrade path from the most basic membership to the full bells-and-whistles membership. However, *Altru* does not automatically recognize an upgrade path for levels, so *you* have to tell it what the upgrade path should be. To designate a specific level hierarchy on the membership program record, select a level and then promote or demote it to change the sequence.



Name	Description	Price	Number of members	Number of cards	Number of children	Reporting group
Adult		\$50.00	1	1	1	
Couple		\$90.00	2	2	2	
Family		\$150.00	2	2	4	



Hold Up!

Always list your most basic level at the top and then arrange the remaining levels in order according to your upgrade path, with the full bells-and-whistles level always at the bottom. If you don't do this correctly, your membership upgrades might get all turned upside down. A member might upgrade and end up with a lower level membership, or downgrade to a higher level membership!

Reporting Groups: Maximum Reporting Detail

Reporting groups provide an optional layer between the membership program and its membership levels. You can use reporting groups to categorize the levels of a membership program.

How do you know if you should use reporting groups? And what are the benefits? Well, the benefit would be in analysis. If you set up a Standard reporting group that includes your regular membership levels and then a Fellows group that includes your benefactor membership levels, you could run reports and view data for just one reporting group. Most organizations with multiple levels in their membership program should use reporting groups for analysis. If you only have a couple of membership levels, you probably don't need that level of reporting.

Benefits, Add-ons, Discounts, and Promotions: The Enticements

Remember at the beginning of this chapter when we mentioned how some people become members because they really want to support your mission? And others like what you do but are enticed into becoming members because they *really* like the coffee mug you include with membership? Well, add-ons, benefits, discounts, and promotions are where you create the value proposition that can increase memberships and member affinity.



Keep in Mind...

Your best members will provide a high lifetime value over the course of their relationship with your organization. Know their expectations....and exceed them with the right benefits.

First, let's go over terminology. All of these concepts are similar but each carries its own set of nuances. We'll discuss each in-depth shortly, but here's a quick rundown of what's what.

Discounts. From *Tickets*, you can set up discounts that members receive on tickets or merchandise simply because they're a member, based on their membership program or level. It's a benefit of being a member... but not exactly.

Benefits. We say discounts aren't exactly benefits, because the term "benefit" in *Altru* refers specifically to an item or gift a constituent receives when they first become a member or upgrade to a new level. It may sound a little weird, but just think of benefits as being exclusively "stuff."



Hold Up!

Just to be sure we're clear, membership discounts are not called "benefits" in *Altru*. They're just discounts that members get when they make a qualifying purchase. On the record of a membership program, the Benefits tab displays only the items that members receive as gifts, not the members' discounts.

Promotions. While discounts are savings a constituent receives *after* they become a member, membership promotions are "specials" or "sales" that you set up to lower the price of a new membership or extend the duration of a membership. For example, you could set up a summer membership promotion where new members who join between June through August get 50% off their first membership term.

Add-ons. Add-ons are benefits the member can purchase or receive when they join or renew, regardless of their level. For example, your members may automatically receive a free T-shirt as a benefit when they join, but they can also purchase (or "add on") additional T-shirts at a discounted price (while the non-members get to pay full price at the gift shop). Similarly, you can offer to add on additional members to the number of members allowed at their level. Only "additional member" add-ons can be sold online.

Members only events. You can offer tickets to member only events to reward current members while also enticing non-members to purchase memberships so they can attend, too.

Before we continue, keep in mind that all of these "enticements" are entirely optional, but they can be used effectively to help you gain more members. Now we'll go into a bit more detail about each.

Member Ticket and Merchandise Discounts: Everybody Loves a Deal

Ticket and merchandise discounts can be a powerful membership draw. If a patron thinks they'll come to your organization several times during a given year and you set up a ticket discount that provides members 4 free tickets per transaction, that's just a good deal for them. The good deal for you is if they keep coming back to use their free admissions, and then they renew, and they tell six friends, and they each give a donation or join as members...you get the picture.



Keep in Mind...

While good deals can pull in new members because of the value, it's probably not a good idea to *promote* membership as a good deal. It may be tempting to do this, but promoting membership as a good deal doesn't necessarily translate to loyalty in the long run. Rather of building long-term relationships, it could set people up to care only about the bargain deal.

In *Altru*, you can create an unlimited number of discounts that are applied to purchases based on availability restrictions, like whether or not the purchaser is a member. From *Tickets*, you can set up discounts that take 10% off merchandise purchases, Buy One, Get One Free admission tickets, or Buy a Hat, Get 50% Off tickets. When you add a discount, you can lock its availability down to only specific membership programs and levels. The sky's the limit, just be careful not to give away the farm.

Benefits: Everybody Loves Swag

In *Altru*, membership benefits are items that people receive when they become a member, like a free tote bag, coffee mug, or shirt. It's an enticement and a thank you gift... just like the items people receive when they pledge a donation during a telethon and then fulfill that pledge commitment.

So how do benefits work? Well, you decide what items you want to give away and then you source those items. For example, you get your hats embroidered, your mugs printed up with your logo, and your tote bags silk-screened.



After you know what items you're going to include with memberships, you access the Benefits Catalog from *Memberships* or *Fundraising* and add each item to the catalog. When you add the items, make sure you select "Membership" as the category.

You'll also need to enter a value for the item. The value is important because while a membership is tax-deductible, the items or gifts a member receives with a membership are not. So when a person buys a \$100 membership and receives a mug, they can't claim a \$100 tax deduction because they received an item in addition to the membership. However, they can claim a tax deduction for the amount paid minus the value of the mug, and that's where the importance of correctly setting the value comes in. When *Altru* calculates the tax-deductible portion of the payment for a receipt amount, it considers the cost of the membership minus any benefits associated with the level. Bingo!

After you add the items to the catalog, you can assign each item to the correct levels of the membership program. For example, if you have an annual program with Bronze, Gold, and Platinum levels, you can source bumper stickers, coffee mugs, and T-shirts and assign them to the levels of the program. When a person joins at the Bronze level, you give them the low-cost bumper sticker; when a person joins at the Platinum level, you give them all three items to reward their enthusiasm for your organization.



Keep in Mind...

While you may offer benefit items for sale through your gift shop, benefits are not tied directly to the merchandise you inventory in *Altru*. You manage sales items from *Merchandise*, and maintain your benefit items separately in the Benefits Catalog from *Memberships* or *Fundraising*. If you pull an item from the gift shop to use as a benefit, we recommend that you adjust the item's inventory amount in *Merchandise* and enter something like "membership benefit fulfillment" as the reason for the adjustment.

Add-ons: A Little Something Extra

Add-ons can also be used to sweeten the pot for a new membership or an upgrade. Say you want to offer benefits to members at reduced prices, without any impact to their levels. Or you want to allow members to purchase additional memberships for their nanny or other family members at a special rate. That's where add-ons come into play.

From *Memberships*, you can maintain the items available to members as add-ons. For example, you can create add-ons for additional members, like guest passes. You can also specify benefit items such as T-shirts, posters, or free parking passes. When you add a membership program, you can select whether it uses add-ons and then specify which add-ons are available to its members. When you select your add-ons, you can enter its price for the members (including "\$0.00" for free items) and specify whether members can purchase multiples of an add-on. For example, you may want members to be able to buy as many T-shirts at a reduced rate as possible, but you also want to limit the number of additional members to one per membership.

From *Sales*, you can include add-ons with membership transactions in a sales order. Or, in the back office, you can select which add-ons to include with a membership dues transaction when you enter dues payments from *Memberships* or *Revenue*.

Promotions: Too Good To Pass Up

Promotions are special deals you can set up to move more memberships and entice existing members to renew early. You can set up two types of promotions: discount promotions and term extensions. From *Memberships*, you click **Membership promotions** to get started.

With discount promotions, you can set up all kinds of special deals for memberships, such as 50% off during the Spring has sprung promotion or \$20 off a membership purchased during the Summer nights promotion.

Unlike the discount promotions, term extensions don't change the price of a membership. Instead, the member simply gets more for their money. For example, you can set up an Early bird renewal promotion that gives members a three month term extension when they renew before their final month.

Discount promotions can be applied to a membership transaction manually by a ticket seller or by entering a discount code that's tied to the promotion. The choice is yours when you create the promotion.

Members Only Events: Exclusive Access

As a special thanks, you can offer access to exclusive members only events, such as a Behind the Scenes Tour or Meet the Author Night, as a benefit of membership. When setting up scheduled programs and events in *Tickets*, you can specify which types of members are eligible to purchase tickets and set the maximum number of tickets they are allowed to buy.

Renewals: Leave the Window Open

When you add an annual membership program, you'll specify the actual duration that determines how long its memberships last. For a dues-based program or level, you set the term of the membership as a fixed term like a calendar year, or a variable term based on the start date of the membership. You'll also specify whether the membership expires on the same date as the original transaction or at the end of the month.

For dues- and contributions-based levels and programs, you can establish the renewal window. When you set up the renewal window, you specify the size of the window in relation to the expiration date. The window can be as big as you want, from a small basement window (a month before and after the expiration date?) to a large bay window (12 months on either side of the expiration date?).

Edit renewal information

Membership term:

For dues-based levels, set expiration date to:

Set expiration to the end of the prior month when starting before day of the month

Renewal window

Before the expiration date

Renewal windows starts:

After the expiration date

Renewal window ends:

Revenue received during this time counts toward a renew.

After the expiration date but still in the renewal window, members are considered

for

After that, members are considered

for

Use promotions to encourage members to renew before their expiration date.

After the renewal window

Revenue received during this time counts toward a

Members who haven't renewed by this point will be considered unless they rejoin

Help Save Cancel

After you define the duration of the window, you can set up what happens to memberships as they approach and then pass the expiration date. For example, you can define when memberships are considered lapsed and expired. You can also specify what happens after the renewal window closes, such as how to classify constituents who did not renew their memberships. You can completely customize the renewal window so it best fits the needs of your membership efforts.

Multiple Membership Programs: When One Just Isn't Enough

If you value a single upgrade path and want consolidated membership reporting, we strongly recommend you go with one membership program for your core memberships. Here's an example of how you could go down the wrong path with multiple programs and possibly regret it later.

Say the Museum of Science and Technology has a General membership program with Individual and Family levels and a separate Fellows program for what they call Sponsor and Founder levels. On one hand, this makes sense, with one program for standard memberships and another for what could be considered benefactor memberships. Here's the rub: There's no upgrade path between separate membership programs in *Altru*. In this example, an Individual could upgrade to a Family level, but the member could never upgrade to the Sponsor or Founder levels because those are part of a different program. This is problematic if you care about having a definitive upgrade path for your members to follow.

Another problem with separate membership programs is reporting. In this example, you would never be able to run comprehensive membership reports that include data for both membership programs. Instead, you'd have to run separate reports for each program.

With hindsight being 20/20, how should the Museum of Science and Technology set up their membership programs in *Altru*? Simply stated, they should have one membership program that includes the Individual, Family, Sponsor, and Founder levels. To report on their benefactor memberships separate from their standard memberships, they can use a General reporting group for their Individual and Family levels and a Fellows reporting group for their Sponsor and Founder levels. Easy, peasy!

So we've discussed the importance of having one core membership program, but is there a time when it makes sense to have multiple programs? The answer is "Maybe," but only when the programs will be used in distinctly different ways from your core membership program.

Again, you should always have a single membership program for your core memberships, that doesn't change. However, you can add additional annual programs for contributions-based memberships, such as Adopt an Animal, and auxiliary memberships or clubs that have no need for an upgrade path and are totally separate from your core membership program.

Auxiliary Membership Programs: Join the Club. Auxiliary membership programs or clubs get people involved with your organization in a casual, community-building way. They're all about engaging people in activities related to their specific interests while increasing their affinity for your organization. For example, you could have a Turtle Savers program where members gather to pick up litter on beaches or a Star Watchers Club where members meet to observe the night sky. Generally speaking, within auxiliary programs like these, you would have a single level because there's no need for an upgrade path.

Contributions-Based Programs: Adopt a Penguin. Another legitimate reason for multiple programs is fundraising. Your organization can set up specific contributions-based annual programs that provide another giving opportunity and revenue stream. For example, the Museum of Natural History might set up an Adopt an Animal program where people can pay a fee to "adopt" a penguin, sea otter, kangaroo, or polar bear. When you create an auxiliary or

contributions-based program, you may not want to limit the number of membership levels a constituent can have on their constituent record. In this case, when you edit the program, you should select **Allow multiple memberships**. But, again, you never want to allow multiple memberships for your core membership program.



Keep in Mind...

To provide members more flexibility in making payments, it might be useful offer an annual dues based program and a recurring membership program that share levels. For example, your lowest level may allow members to pay dues of \$100 per year or they can pay any amount between \$5-10/month. Members at this level would receive the same benefits, however, the annual membership would expire at the end of the year, while the recurring member would receive benefits as long as they continue to make recurring payments.

Card-Carrying Members

Membership cards are how members identify themselves when they visit you. The cards can have barcodes you can scan or swipe during a sale to associate the member with a sales order. Don't worry if you don't have fancy card swipes or scanners... you can also just look up the member right from the Daily Sales and Advance Sales pages.



Did You Know?

Once a member is associated with a sales order, discounts they're eligible for can be applied to qualifying purchases of discountable stuff. Awesome, right?

So that all sounds good, but how are membership cards created? First, you have to decide a few things as an organization... stuff like "do we want to print our own membership cards or do we want an external membership card company to handle production?" Either is cool; *Altru* handles both situations.

If you want to print them yourself directly from the membership record, you select a membership card format to use when you add or edit your membership program. *Altru* includes multiple preconfigured formats you can use, like the “Full sheet, letter with 1 card” and the “Full sheet, letter with 2 cards.”

Add a membership program

General Levels **Benefits** Dues Renewals Review

Membership cards will be created for levels in this program.

Card format: What do these look like?

Name format:

3 per page - 1 card each
Full sheet, letter with 1 card
Full sheet, letter with 2 cards
Membership Card Format

Is a portion of the membership dues considered tax deductible?

Yes, the entire amount is tax deductible
 Yes, a portion is considered tax deductible
 No, nothing is tax deductible

What benefits

Tips

Benefits - Benefits for a membership level may affect the tax deductible amount of the membership.

Discounts - If your discounts don't currently exist, that's fine. You can create discounts and associate them after you create the program.

To create discounts or promotions, use the Membership promotions task.

Help Previous Next Save Cancel



Did You Know?

Each card format is a mail merge document created in Microsoft *Word*. The card formats use data fields that pull specific member and membership information from your database to create the membership cards and content.

The format you choose really depends on your printing capabilities, including the printers you have and the card stock you want to use. If you plan to have your membership cards printed in bulk internally or by an external company, or you do not print cards from a membership record directly, it doesn't matter what format you select here, you can even leave it blank.

So when are membership cards typically printed? Most organizations don't print cards on the spot when a membership is purchased because it could slow down the ticket line and make people cranky. Instead, membership cards are usually printed weekly or every couple of days. That schedule might be different if an external company prints your cards.

To print cards, from *Memberships*, click **Print membership cards**. From there, you set up a membership card "process" which is what you'll run on a regular basis to print your cards. If you don't print your own membership cards, you'll still run this process to generate a *.csv file full of membership card data that you can download and provide to your external printer.



Did You Know?

If you just need to print an individual membership card, you can do that right from a member's constituent record if you assigned a card format on the membership program.

How do organizations get those newly-printed membership cards out to members? Most send them through the mail along with a simple letter or as part of a welcome packet. For example, some of the membership card formats provided with *Altru* include a letter on the top half of the page with one or two membership cards on the bottom. The letters pull in constituent information from your database just like the membership cards. You can even personalize the language of each letter before it prints. For a membership purchased as a gift, the letter can include a custom personal message from the gift giver and the membership card will be delivered to the giver or recipient, as the giver requests.

Get Members: You Really Like Me!

Your mission will resonate with people, some more than others. The people that really understand and support what you do will become your membership community. This group becomes the advocates for your organization and may influence friends and family to join. But what about all those anonymous people that visit your organization everyday? How do you turn those visitors into members?

Not Entirely Anonymous...

The first step in turning anonymous visitors into known members is to capture quick bits of information about them in a painless way that doesn't slow down your ticket line. Each bit of information you capture will help later when your organization launches targeted marketing efforts to increase memberships.

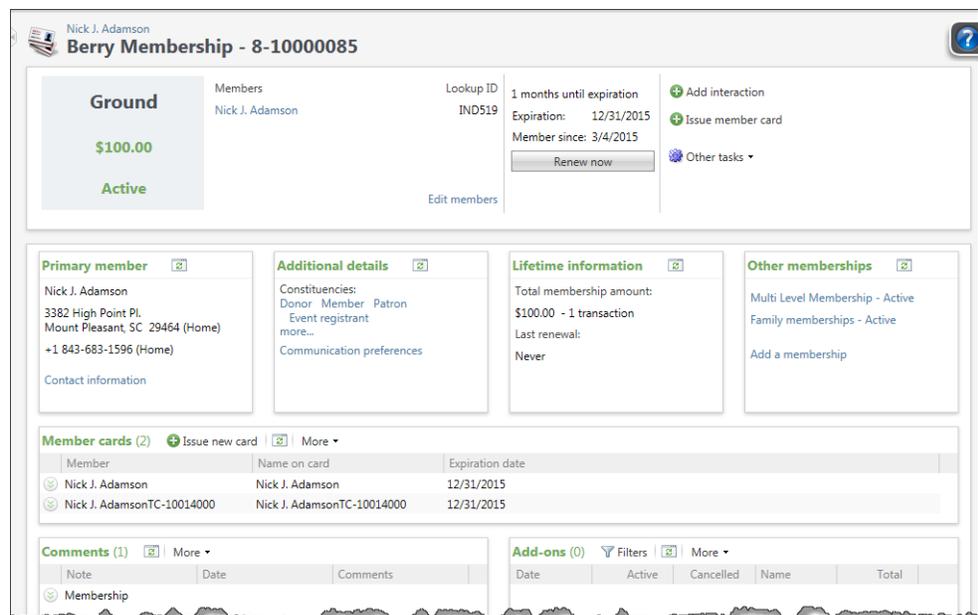
But how do you capture information about visitors who purchase walk-up tickets without slowing down the entire sales process? Use simple marketing surveys that become part of the sales process that are built into *Altru*. You don't have time capture their names or addresses (and they may not want to give that information anyway at this point), but you can capture their ZIP Codes as they come through your door.

By collecting the ZIP codes of people who purchase tickets, you can see where the majority of your visitors come from. You can then use that data to strategically plan advertising or marketing efforts in those areas where people are supportive of your mission. Many of these people will hopefully be receptive and take the next step from anonymous patron to known member.

In addition to capturing ZIP Codes, you can create your own questions to ask during quick marketing surveys. For example, you can ask a question like "What are you most excited to do during your visit today?" which could be useful for planning future programs.

Membership Records: View It All At a Glance

Of course, after an anonymous visitor crosses that bridge to a known member, you'll have a lot more information to keep track of than a ZIP Code. For example, in addition to the member's contact information, you'll need to know the status of the membership, any additional members on the membership, recent membership transactions, and more! In *Altru*, you can view and manage a member's involvement from the record of the memberships.



Berry Membership - 8-1000085

Ground
\$100.00
Active

Members: Nick J. Adamson
Lookup ID: IND519
1 months until expiration
Expiration: 12/31/2015
Member since: 3/4/2015
Renew now

Actions: Add interaction, Issue member card, Other tasks

Primary member
Nick J. Adamson
3382 High Point Pl.
Mount Pleasant, SC 29464 (Home)
+1 843-683-1596 (Home)
Contact information

Additional details
Constituencies: Donor, Member, Patron, Event registrant, more...
Communication preferences

Lifetime information
Total membership amount: \$100.00 - 1 transaction
Last renewal: Never

Other memberships
Multi Level Membership - Active
Family memberships - Active
Add a membership

Member cards (2)
Issue new card | More

Member	Name on card	Expiration date
Nick J. Adamson	Nick J. Adamson	12/31/2015
Nick J. AdamsonTC-10014000	Nick J. AdamsonTC-10014000	12/31/2015

Comments (1)
Membership

Add-ons (0)
Filters | More

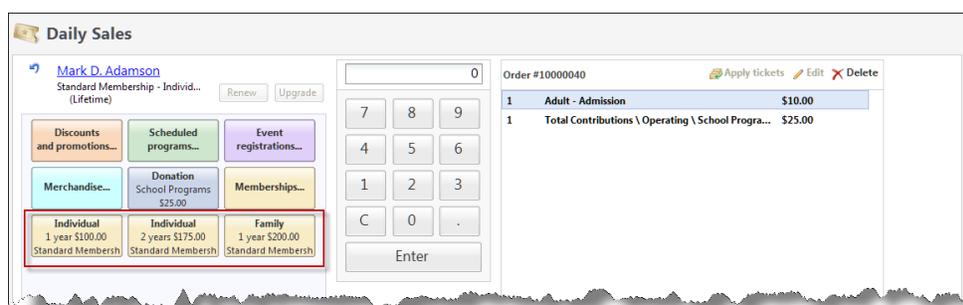
Date	Active	Cancelled	Name	Total
------	--------	-----------	------	-------

In addition to all the information mentioned above, you can also view additional interactions between the member and your organization, benefits the member has received, and the total amount of revenue your organization has received from through the membership. From the record, you can also manage the status of the membership, issue membership cards, and add interactions you have with the members. In short, the record is your one-stop shop for all the detail you could want about the membership!

Membership Sales: Always Be Closing

In *Altru*, you can sell memberships in several different ways, including walk-up sales, phone sales, online sales, and through the “back office.”

From *Sales*, the Daily Sales page is your primary avenue for selling memberships. It’s designed to handle high-volume walk-up sales and can be used as a touch screen. Through the Daily Sales page you can sell new memberships, gifts of membership, and process regular or mid-term upgrade renewals.



One of the unique features of the Daily Sales page is the capability to create custom buttons for the most popular things you sell. By default, the page has a Membership button you can click to select a specific membership to sell. But if you sell the same membership 75 percent of the time, you can add a button for that exact membership level. This can save a lot of time when you have a line of people waiting to buy tickets.



Did You Know?

When you sell a membership, the benefits and discounts associated with the membership become effective immediately! This means you have a great opportunity to upsell. For example, if a patron is buying admission tickets that would be discounted along with a membership purchase, mention that to see if they’re interested.

The Advance Sales page is another way to sell memberships in *Altru*. It's designed primarily for phone sales and you can use it to sell memberships, gifts of membership, and process regular or mid-term upgrade renewals.

Advance Sales

Select patron Create order Add payment

Memberships Donation Event registration Merchandise Discounts and promotions

Sell a membership Give a membership

From: 8/2/2011 To: 8/2/2011 Apply Reset

Show past events

Name	Availability	Start date	Start time	End time	Category
Admission					
Sharks - Monsters of the Deep	300	8/2/2011	4:00 PM	5:00 PM	

Tickets for Admission

Adult	\$10.00	<input type="text" value="0"/>	Child	\$3.00	<input type="text" value="0"/>
Senior	\$8.00	<input type="text" value="0"/>			

Add to order

Order #10000041 Apply tickets Edit Delete

Delivery method - In person

Complete Total: \$0.00

Pay on arrival Tendered: \$0.00

Cancel Balance: \$0.00

If your organization has a website, people will want to purchase memberships online. Don't disappoint them! With *Web*, patrons can buy or renew memberships when they access your website.

And finally, you can enter payments for membership dues from *Memberships* or *Revenue*. This is more of a back office sales process that's typically used by your membership and development office. When you enter membership dues from *Memberships* or *Revenue*, you can enter one payment at a time or multiple payments as a membership dues batch.



Did You Know?

To save time, you can enter multiple payments at once using batch entry. You can find more in-depth information about batches in the Data Management chapter.

Regardless of how many dues payments you enter at a time, *Altru* guides you through the process by asking a series of questions, such as which membership the payment is for and whether to apply a discount or promotion, and adjusts its questions based on your responses.

Bill to	Total

Projected total	0
Current total	0
Projected amount	\$0.00
Current amount	\$0.00

Join, Upgrade, Downgrade, Renew, Drop, and Rejoin: It's Action Time

Membership actions are how *Altru* identifies what has occurred transaction-wise with a membership, and these actions make up a member's unique membership history. To see what has transpired for a member, just check under **Recent membership transactions** on the membership record. For example, when a constituent first purchases a membership, that's a "join." If you have one core membership program with a single upgrade path, a member will have only one "join" as part of their transaction history.

If that person joins as an Individual and then gets married, the next time they visit they may “upgrade” to a Family membership. They can “renew” for a year and upgrade, which will give them the remaining term at the upgraded level plus another year. Or they could do a mid-term upgrade that gives them the new level for just the remaining duration of their current term. If, during that time, they decide that the Individual level was actually enough membership for them, they could “downgrade” back to Individual.

Hopefully this will never happen to your organization, but they could decide to cut back and cancel the membership. The cancellation would appear as a “drop.” Or they could simply decide to let the current membership expire, which after the grace period would appear as “lapsed” or “expired.” If they decide after the cancellation or lapse that they miss having the membership, they can “rejoin.”

Retain Members: You Still Really Like Me, Right?

There will be a time when a member needs to make a decision to either renew and stay a member or let their membership lapse. If things really don't go according to plan, they may even cancel their membership early. Or things can go better than expected and during a visit to your organization they not only renew early, but upgrade their membership.

Renewal Rules

When you add or edit your membership program, you can set renewal rules that establish a renewal window. The renewal window defines what happens before and after the expiration date, and what happens after the renewal window closes. You can set rules that determine how and when the membership status of a member changes once the membership has expired. For example, a member's status might change to lapsed once the membership expires.

Handling Renewals

When members visit your organization, they can renew when they buy tickets at the guest services desk, which is handled through the Daily Sales page. Or they can call your organization and renew over the phone, which is typically handled through the Advance Sales page. But the primary avenue for processing renewals is through renewal mailings.

A renewal mailing is a targeted appeal you send to members when their memberships are close to expiring or have recently expired. You can send renewal notices through traditional mail or email. Let's take a closer look at how renewal mailings work...

Typically, if you generate traditional renewal notices from *Altru*, you'll send them along with a response card. If a member wants to renew, they return the response card and include a check to pay for the renewal. As we discussed earlier, your membership or development office would then enter these payments one at a time or as a membership dues batch.

The other option for renewal notices is email. For this to work, you must have the membership form created from *Web* on your website. If you send renewal notices through email, you can include a contextual link in your message that makes it easy for your members to renew online.

Set Up Your Renewal Mailings

The steps involved to set up and process your renewal notices can get a bit complicated, but *Altru* tries to help by providing default settings, letters, packages, and others things you can use with minimal input. We'll touch on the main setup points here to get you familiar. But remember, you can always check out the *Memberships Guide* for detailed information and procedures. Alrighty, here we go...

To set up your renewal notices, you access your membership program record and click **Set up membership renewal notices**.

Set up membership renewal notices for Standard Membership

Name:

Description:

Membership levels to include

Level
<input checked="" type="checkbox"/> Individual
<input checked="" type="checkbox"/> Family
<input checked="" type="checkbox"/> Student

Renewal notices

Select the points in time you want to contact your members about membership renewal, then select a mail package, email package, or both for each renewal notice. Each patron's communication preference will be observed if both are selected.

	Time to expiration	Mail package	Email package
<input type="checkbox"/>	3 months before		
<input type="checkbox"/>	2 months before		
<input checked="" type="checkbox"/>	1 month before	1-month renewal notice (...)	1-month renewal notice (...)
<input checked="" type="checkbox"/>	Month of expiration	Month of expiration notic...	Month of expiration notic...
<input checked="" type="checkbox"/>	1 month after	Membership expired noti...	Membership expired noti...
<input type="checkbox"/>	2 months after		
<input type="checkbox"/>	3 months after		

For patrons with no mail or email package preference, use when both are selected.

[Help](#)

By default, the mailings you generate through *Altru* target three groups of people at specific times that are relative to their membership expiration date. These points in time are:

- One month before a membership expires
- Month of expiration
- One month after a membership expires

You can change the timing of these notices if you want, but the default settings provide a good period of time for members to decide whether to renew and respond.

When you set up renewal notices, you can also select the membership levels to include and the mail and email packages to use. By default, *Altru* includes default packages for mail and email notices. The packages contain letter templates that pull data from your database to generate personalized notices.



Keep in Mind...

You can view and edit the default letter templates included in the mail and email packages to customize the language and merge fields included in each. From the membership program record, click **View letters**.

If you don't plan to generate email renewal notices, make sure you remove the email packages from the grid when you set up notices. If you do plan to generate email renewal notices, there are a number of additional tasks you'll need to complete, such as setting up your privacy policy and opt-out preferences and designing a membership renewal page that can be linked to from the email notices you send. To help you complete each task, *Altru* provides a checklist you can follow. To review the checklist, simply click **Email setup** from the membership program record.

Get Members Again: We Really Want You Back!

When a member's membership lapses, it can be for many reasons. It could be entirely an economic decision or the desire to help further your mission may have faded. Both of these reasons could be temporary, so keeping the member engaged through newsletters and other correspondence may prove beneficial. If the economy picks up, they may be ready to rejoin. Or a mailing may jog their senses and they may realize that they want to support your mission again.

They Canceled or Lapsed, Now What?

Members who do not renew or have canceled are still valuable to you. They already have an affinity for your organization, so you just have to re-engage them in the right way and the likelihood that they'll rejoin is high.

Maybe the answer is another renewal notice mailing, but this time you create a mailing for memberships that have expired six months ago or twelve months ago. And instead of the usual renewal language, you go with a "We miss you!" theme that focuses on the mission and the benefits membership brings.

At a minimum, you want to replace your lapsed members with new ones so your membership community stays strong. Track those who don't renew and if they greatly exceed new members, start a member acquisition campaign.



Memberships Backtrack

Before we move on to how you can manage your fundraising and special events through *Altru*, let's look back at some key concepts and important items to consider when it comes to memberships.

- Memberships can transform anonymous people who visit your organization into known constituents who support your organization through donations and other fundraising efforts.
- A membership program is the first building block of your membership offerings. You start with a membership program and add other components like levels and terms to determine the duration and benefits included in the memberships you sell.
- In *Altru*, a single or "core" membership program is all you need. This single program provides a clear upgrade path for members and enables consolidated reporting. However, you can create multiple types of membership programs based on the duration of your memberships and whether its members pay for the membership through dues, contributions, or both.

- Annual programs are for memberships of a specific duration with an expiration date.
- Recurring, or sustaining, programs are for memberships with no expiration date, as long as the member pays a set amount on a recurring basis.
- Lifetime programs are for memberships with no expiration date, as long as the member pays a substantial amount in full.
- Reporting groups provide a way to categorize levels within a program or across multiple programs. They're an optional layer between the membership program and its levels.
- You use levels within your membership programs to provide different offerings and benefits at different price points. Levels also provide a distinct upgrade path that you determine.
- When you add levels for a program, you must place the levels in a specific hierarchy to determine the correct upgrade path. On the membership program record, you select a level and click **Promote** or **Demote** to change the sequence. Your most basic level should stay at the top while your highest bells and whistles level is always at the bottom.
- Benefits are specifically items or gifts a person receives for becoming a member or pledging a donation.
- Add-ons are benefits members can purchase or receive regardless of their membership level, such as additional T-shirts at a discounted price or additional members to the membership.
- You can offer tickets to member only events to reward current members while also enticing non-members to purchase memberships so they can attend, too.
- Ticket and merchandise discounts can be a powerful membership draw. In *Altru*, you can create an unlimited number of discounts that are applied to purchases based on availability restrictions, like whether or not the purchaser is a member.

- ❑ Promotions are special deals you can set up to move more memberships and entice existing members to renew early. There are two types of promotions you can set up: discount promotions and term extensions.
- ❑ Membership cards are how members identify themselves when they visit you. The cards can have barcodes or mag stripes that you can scan or swipe during a sale to associate the member with a sales order.
- ❑ If you collect the ZIP Code of people who purchase tickets, you can see where the majority of your patrons come from. You can then use that data to strategically plan advertising or marketing efforts in those areas where people are supportive of your mission.
- ❑ From the membership record, you can view all detail about the membership, including its members and their membership transactions and interactions with your organization. You can also manage the status of the membership, issue membership cards, and add interactions you have with the members.
- ❑ You can handle membership renewals in many different ways, including over the phone, in person, or online. However, the primary avenue for processing renewals is through renewal mailings.
- ❑ A renewal mailing is a targeted appeal you send to members when their memberships are close to expiring or have recently expired. When you send a renewal notice, you can send them through traditional mail or email.
- ❑ Members who do not renew or have canceled are still valuable to you. They already have an affinity for your organization, you just have to re-engage them in the right way and the likelihood that they'll rejoin is high.

For detailed information about the features discussed in this chapter, including membership setup processes, see the *Memberships Guide* available at <https://www.blackbaud.com/howto/altru.aspx>.

CHAPTER 8

Events

"The events in our lives happen in a sequence of time, but in their significance to ourselves they find their own order: the continuous thread of revelation."

– Eudora Welty

In This Chapter...

- ▶ ***Event Configuration: Let's Get These Parties Started Right***
- ▶ ***Event Planning and Management: 24-Hour Party People***
- ▶ ***Event Information: Shindig Dirt***
- ▶ ***Events Backtrack***

Which Hat Do You Wear?



The content in this chapter applies most directly to board members, data entry personnel, directors, and users who manage events and marketing. In this chapter, you learn about how to plan and manage your special events held outside of programs and ticketing for fundraising, stewardship, and marketing efforts.

As we discussed earlier, you can manage your admission programs and scheduled programs such as exhibits, performances, and lectures as “program events.” These are the events your organization manages from *Tickets* and sells tickets for through daily and advance sales. However, your organization may hold additional events such as:

- Fundraising galas and festivals
- Training sessions for volunteers
- Marketing and community outreach events
- Holiday dinner parties to thank donors and volunteers

In *Altru*, you plan and manage these non-program, special events in *Events*. This feature area provides project management tools not included for scheduled events, such as expense tracking, task coordinators, invitations, and seating.

Event Configuration: Let's Get These Parties Started Right

Before you start to add your special events to the database, your organization should set up the default options for these types of events. Think of it as some preliminary party planning.

Event Categories: Party Down, Up, or Sideways

To help organize your events and compare the success of events, you should assign categories to your special events. These categories identify the types of special events you hold. For example, maybe your organization organizes events in categories for Stewardship (to award and cultivate your existing constituents), Marketing (to spread your mission and foster new relationships), and Fundraising (to bring in donations and revenue toward your designations). That’s just an example, of course ... your organization can manage these categories to best fit its needs.

You can configure event categories from the Code Tables page in *Administration* or “on the fly” when you add an event. You can then use the category to search for an event record or analyze and compare the effectiveness of similar events.

Locations: Where's the Party?

An important consideration in planning your events is WHERE to host them. You can hold these events at the same locations as your program events, but you might also need to use additional facilities such as banquet halls or conference rooms. You can use the Location availability report in *Sales* to confirm which locations are available on the dates you are considering. If you have registrants traveling some distance to attend these events, you can also track information about where they're staying while in town. From *Events*, you can manage the locations used to host events or lodge your registrants.

When you add an event location, you can enter its capacity to help ensure you don't inadvertently overbook the location. For locations such as convention centers, you can track information about multiple rooms you might use for an event.

When you add a lodging location, you can enter information about any discounted rates your organization has negotiated with the facility. For example, you can track any corporate codes or “secret phrases” your registrants should mention when they make their reservations to get the discount. If your organization reserves a block of rooms at a facility, you can also track information about the types of rooms (smoking and non, with or without kitchenettes, etc.) and the number of each you have in your block.



Did You Know?

On the go and need to check in a registrant at a special event? After you arrive at the event location, you can use mobile check-in to add registrants from your iOS or Android device. You can access mobile check-in from the *Altru* launch page.

Registration Types: Special Event Price Types

Similar to the ticket price types you set up for program events, registration types are the options you offer for your special event registrations. For each registration type, you can set up how many registrants each option represents. For example, you may create a registration type of “Member/Single” with a registration count of one and “Member/Family” with a registration count of four. When you set up an event, you can select which registration types apply to the event and the registration price for each.

Restriction Types: Party Foul Prevention

As you register constituents for your special events, some registrants may have dietary and religious restrictions you need to track. For example, if you host a banquet, it is good to know if any registrants have considerations to keep in mind. Handing a vegetarian a plate full of fried turducken (for the uninitiated, that’s turkey stuffed with duck, stuffed with chicken) at your volunteer Thanksgiving dinner? Sprinkling nuts on a sundae meant for a peanut-allergic donor at your ice cream social fundraiser? Tracking these restrictions is a critical part in avoiding these party *faux-pas*.



Did You Know?

Restrictions are saved to the registrant’s constituent record. For restrictions that are not permanent, such as a temporary mobility issue, we recommend saving those as preferences on the event. If the restriction is permanent and critical, such as a food allergy, we recommend adding it as a restriction on the constituent record *and* as a food preference on the event. This will help prevent issues because the registrant must make a food choice when they register.

Event Management Templates: Support for Supporting Events

Your organization may host events that have multiple levels or “supporting events.” For example, you might host an arts festival as a community fundraiser that includes multiple separate events happening over a weekend. Before you add a multiple-level event to the database, you must set up a template that determines the levels of the event and requirements of each level. For example, do all levels involve registrants, but only some promote lecture speakers? These templates ease the management of your events by streamlining the types of information that appear for each event within a larger, multiple-level event. One drawback to the multi-level events is that they can't be sold online. To get around this limitation, we recommend creating individual special events for the supporting events instead.

Event Planning and Management: 24-Hour Party People

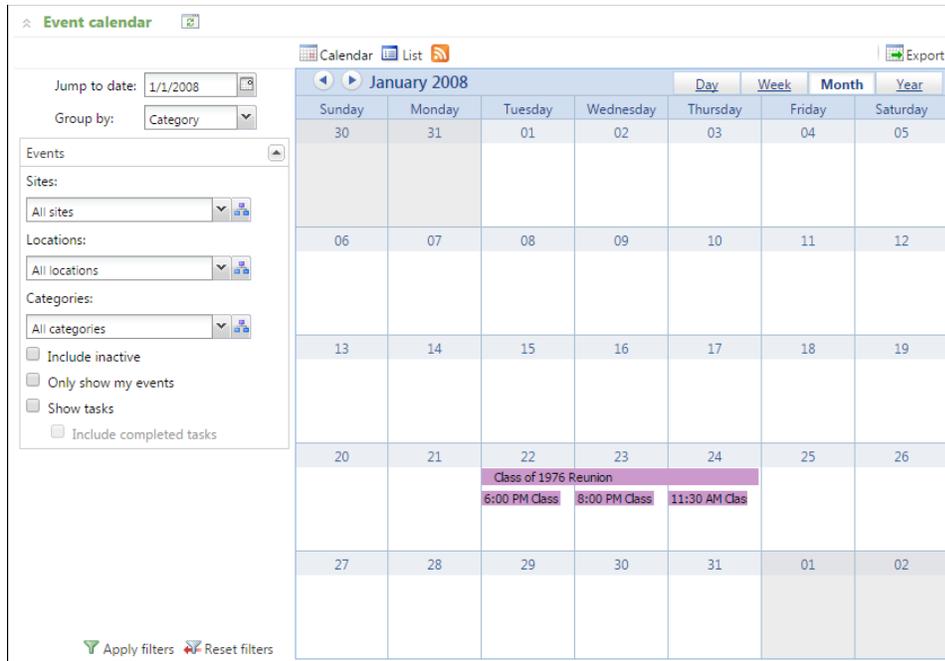
Much like your program events, these special events require active planning and management to ensure a success. While an event itself may feel like a party for your constituents, all the up-front planning and management involved may at times feel like a three-ring circus. From *Events*, you can use several tools to help ease your role as ringleader to plan and manage these events.



Keep in Mind...

To ensure your special events are fun and profitable, you should take the time to plan events carefully. Keep the audience and goals of your events in mind. Remember, an event's “profits” can be monetary amounts or new and enriched constituent relationships. Before you host a large event such as a golf tournament or gala, make sure that your anticipated return on investment, whether it is revenue or relationships, is clear.

Event calendar. On the event calendar, you can view the events and event tasks scheduled within a selected date range. As you plan or add events, this is useful tool to verify that you're not overloading your potential invitees and event staff, volunteers, and resources. Scheduling competing or adjacent but unrelated events can not only exhaust you and your event staff, but it can also cause party fatigue in your invitees and have a negative impact on registrations and your return on investment. You can also view events on the organization calendar to prevent conflicts with scheduled programs or group reservations.



Events overview. *Altru* provides an overview of all your scheduled special events and their related tasks. Think of this as a quick snapshot of all your event activity. From this overview, you can quickly identify overdue tasks, track registrant response, and compare actual and budgeted expense amounts for all events.

Event summary. If planning and managing one special event can be a three-ring circus, then a multiple-level event must be... what, a fifteen-ring circus? Each event record provides summary information about the current expenses and capacity. A multi-level event summary includes a roll-up of its supporting events and the related tasks, registrants, and expenses. You can also use the Event summary report to view all special events during a certain time period or you can drill down into details for individual events.

Event Information: Shindig Dirt

When you're ready to begin working on an event, you can add it to the database from *Events*. When you add an event, you can select its category, specify whether it is part of the main multiple-level event, and enter information about when and where it takes place.



Did You Know?

After you add several events to your database, you can ease this process by copying characteristics of another event. For example, if you host an annual festival, you can copy the detail information from the previous year's event and then update the details as necessary for the new event.

After you add an event to the database, you can then begin to focus in on the other aspects of the event.

Tasks and Coordinators: What to Do and Who to Do It

To host a successful event, you must juggle multiple tasks as the big day approaches. For example:

- Finalize the location and its decorations
- Line up any entertainment or guest speakers

- Coordinate with caterers and other vendors
- Create and manage the invitations
- Plan, plan, plan so everything goes off without a hitch

On an event record, you should track all these tasks to help prevent overlooking anything or missing a deadline. You can also assign events to staff members or constituent groups as coordinators to oversee the event, make sure its tasks are completed, and ensure that everything goes smoothly.

Expenses: The "I" in Your ROI

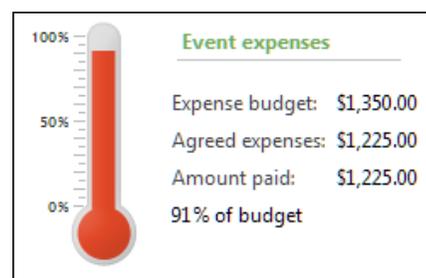
Remember, these events should be fun and *profitable*. Some fundraising best practices claim that your return on investment (ROI) should net two to four times your expenses. However, with some events such as those held as community outreach, your ROI may not be immediately evident but instead result in the building of goodwill over time.



Keep in Mind...

To determine the potential ROI of an event and whether to hold the event in the first place, carefully budget the event's expenses and anticipated profit. When you budget an event, be realistic! Refer to your past events and similar events in your area. If a previous event was successful, copy its parameters as you plan your next event and look for areas of improvement to make the new event a greater success.

Of course, you can't determine the return on investment without determining the investment in the first place. So you can quickly verify whether your event is within budget, a thermometer appears at the top of the event record to provide a quick overview of your budgeted and actual expenses.



On an event record, you can manage the expenses, both planned and accrued, of the event. Your organization can manage your types of expenses that most meet your needs, such as Printing, Catering, and Entertainment. When you add an expense, you select its type and the vendor associated with the expense, such as a caterer or clown troupe. You can also track the amounts budgeted for the expense, agreed upon with the vendor, and actually paid. To avoid any nasty overdue notices, you can also track when a payment is due to the vendor and when you actually make the payment.

To ensure an accurate account of an event's cost, such as for your board members and volunteer committee, track all expenses, including those not provided by an external vendor. These expenses add to the event's budget but may not be immediately obvious:

- Staff and volunteer hours
- Donations of food and printing services
- In-house printing
- Cleaning

You'll use this information for year-end reports and IRS purposes, and it provides a record of these expenses for future events that may require an external vendor.



Keep in Mind...

Your finance team will still need to track event expenses in your finance system. However, by also tracking expenses in *Events*, you can provide a much easier place to access the current budget, particularly for staff members planning the event who typically don't have rights to access the finance system.

Options: Registrant Decisions

As discussed earlier, your organization can set up registration types for your special events, similar to the ticket price types you set up for program events. On an event record, you can manage the registration options available for the event and the cost of each option for the event. For a multiple-level event, you can also create registration packages to group multiple supporting events together as one registration option. For example, for an arts festival, you can combine the registrations to a lecture, performance, and closing ceremony into one registration package.

On the Options tab, you can also track registrant preferences applicable to the event. For example, for a dinner event, you can track whether a registrant prefers the grilled steak and chicken platter, the roasted salmon, or the Mediterranean salad as part of the registration process. (I'll take "All of the above," please!)

Invitations: The Guest List

Unlike the program events that you sell tickets for, your special events are typically "by invitation only." Depending on the purpose of the event, it should appeal to the general public or a specific target group of constituents. The purpose of the event determines who you invite. Ask yourself what you want people to understand and take away from the event. For example, you host a

stewardship event simply to let your volunteers and donors know how much you appreciate them. As you plan an event, figure out which constituents best benefit from the event and which also have the greatest potential to help reach your goals. To help determine the potential within constituents, look at their constituencies, membership levels, and track record for event attendance.

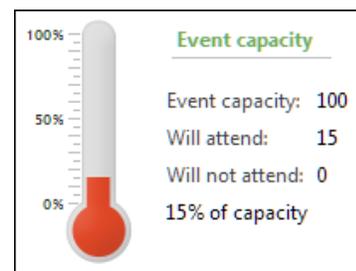


Keep in Mind...

As you build your invitation list, include a few constituents who aren't as active as your other invitees. Consider this a "fishing expedition" to hook prospective donors. You can track whether these invitees respond to the invitation to learn what works and what doesn't.

On an event record, you can manage its invitations. You can use multiple invitations for the same event. For example, you might send a glossy high-end invitation to some invitees and a lower-cost postcard to others, based on giving history. From the event record, you can also manage the invitees list for each invitation. On the invitees list, you can determine who receives the invitation and manage the registration of each invitee.

After you send invitations, you should monitor their response rates and be prepared to make last-minute course corrections as necessary. If response is slow, you can determine whether to send out invitations again or follow up with reminders over the phone or by email. So you can quickly monitor the response rate and whether your event is within capacity, a thermometer appears at the top of the event record to provide a quick overview of actual and anticipated registrant numbers.



Seating: A Place for Everyone and Everyone in Their Place

While “Standing Room Only” might be a gauge of the success of some of your program events, it’s not necessarily a good thing for your special events. Since these events are geared at fostering your constituent relationships, you should avoid forcing those constituents to play a game of Musical Chairs. The level of seating management varies depending on the type of event you host. For example, for a volunteer training session that takes place in a classroom, you’re probably fine with a “sit wherever you like” arrangement, as long as you have enough seats for everyone invited. However, for events such as a fundraising dinner at a banquet hall, seating is much more crucial in the success of the event. From *Events*, you can set up seating layouts for your event locations and assign registrants to seats.

When invitees register for special events, they may include registrations for their guests. For example, an invitee might register for the event with additional attendees in a spouse and another couple as part of a double date. Not only should you be flattered that your invitee thinks highly enough of your organization to make a date night of your event, but you should also look at these guests as prospective donors. To avoid turning this “plus three” into a “divided by four,” you can create a seating group for the double date so you keep them together when assigning seats.

Miscellaneous Information: Everything and the Kitchen Sink

Depending on your events, you can track additional information to ensure the success of each event.

Speakers. For events that feature lectures, presenters, or performers, you should track information about the participant and their presentation, including topic and schedule. Not only does this information help you plan the event and create its agenda, but it is also valuable information to have in the future when you plan similar events or analyze the event's success. Remember, people who present at these events support your organization, so you need to add them as constituents before you add them to your events as speakers.

Documentation. In addition to invitations, there may be other documentation to track about an event. For example, you'll have invoices and receipts associated with the event's expenses. You may also have marketing literature or media advertisements for the event. And hopefully you'll also have a nice response to the event evident through the blogs, Facebook walls, and Twitter feeds of your registrants. On the event record, you can link to web pages and attach media files to help create an archive of this documentation about the event.

Job occurrences. Back in the Constituents chapter, we talked about managing the jobs you assign volunteers to and the occurrences of those jobs. On an event record, you can manage the job occurrences required to support the event. You can also view which occurrences have openings and how many volunteers each occurrence needs.

Lodging options. Your events may have registrants who travel from some distance and require lodging facilities such as hotels or motels. To help accommodate your registrants, your organization may negotiate with lodging facilities to reserve a number of rooms for the event. Your organization may also provide on-site lodging accommodations for registrants and guests. On an event record, you can track the lodging and accommodations for the event.

Attributes. While the event record allows you to maintain all types of pertinent information, there may be more information your organization wants to track for events. To record this information, you can create attributes. For example, if your event includes an awards ceremony, you can create an Awards attribute to record the award presented.



Events Backtrack

Before we move on to how you can process sales orders through *Altru*, let's review how you manage event data.

- You manage events and their configuration tasks, invitations, and registrants from *Events*.
- To help organize your events and compare the success of events, your organization can set up categories to identify the types of events you hold.
- To help plan and manage your special events, you can use the event calendar and events overview. For a multiple-level event, you can also use an event summary to view details about the overall event and its supporting events.
- Your special events should be fun and profitable. An event's "profits" can be monetary amounts or new and enriched constituent relationships.
- Track all the tasks required for an event. You can also assign events to staff members or coordinators to provide oversight and management.
- When it comes to budgeting an event, be realistic! Refer to your past events and similar events in your area.
- As you build your invitation list, include a few constituents who aren't as active as your other invitees. Consider this a fishing expedition to hook prospective donors. You can track whether these invitees respond to the invitation to learn what works and what doesn't.
- For events that feature lectures, presenters, or performers, you should track information about the participant and their presentation, including topic and schedule.

For detailed information about the features discussed in this chapter, including how to perform related tasks, see the *Events Guide* available at <https://www.blackbaud.com/howto/altru.aspx>.

CHAPTER 9

Sales

"Pretend that every single person you meet has a sign around his or her neck that says, 'Make me feel important.' Not only will you succeed in sales, you will succeed in life."

— Mary Kay Ash

In This Chapter...

- ▶ *Daily, Advance, Group, and Online Sales: The Basics*
- ▶ *Point of Sale: One-Stop Shopping*
- ▶ *Cash Registers: Reconcile Your Differences*
- ▶ *Sales Tasks: Wait, There's More!*
- ▶ *Sales Backtrack*

Which Hat Do You Wear?



The content in this chapter applies most directly to ticket sellers and guest services managers. In this chapter, you learn about the different sales screens and your daily *Sales* tasks.

As a ticket seller or guest services manager, you serve as the face of your organization. You handle one of the first interactions patrons have with your organization, so you want to make their experience as pleasant as possible. And nothing will make them happier than a quick and easy sales transaction. From *Sales*, you have all the tools you need to accomplish this goal and complete your sales tasks.

Daily, Advance, Group, and Online Sales: The Basics

Arts and cultural organizations are not all the same; you have different structures and processes to support your unique missions. That said, you probably sell *something* — usually tickets, merchandise, memberships, or facility rentals — to provide services to your patrons and help fund your mission. The *Sales* area of *Altru* includes loads of features to help you manage all types of sales. Our integrated system streamlines everything so you can sell tickets or memberships from the retail counter and not have to re-enter the information in another system.

In this chapter, we'll address the common sales tasks you will complete regularly in *Altru*, but before we get started, it's important to understand the basics about the four types of sales methods managed in *Sales*:

Daily Sales. Use the Daily Sales page to quickly process in-person sales of tickets, memberships, and merchandise. You can also accept donations and process registrations for fundraising events.

Advance Sales. Use the Advance Sales page to complete these same tasks for sales made over the phone or by mail for events occurring in the future. With Advance Sales, patrons can choose how they'd like to receive their purchased items — for example, they can pick up their tickets at will call or have them shipped by standard or overnight mail. Patrons also have the option to pay on arrival if they choose to pick up their tickets.

Group Sales. Use Group Sales to book group reservations and facility rentals, and perform all their related tasks. Because Group Sales is more complex, we address it in its own chapter later in this guide.

Online Sales. With web forms, patrons can purchase tickets and memberships, and make donations using the shopping cart on your website. Sales orders from online transactions are managed in *Sales*. You can learn more about web forms in the Introduction chapter of this guide.

Point of Sale: One-Stop Shopping

One of the marvels of *Altru* is the ability to configure a complete point of sale (POS) system that consolidates your ticketing, merchandise, and membership sales within a single interface. You can connect *Altru* workstations to POS peripherals such as cash drawers, credit card readers, receipt and ticket printers, and barcode scanners. With touch screen monitors or tablets, you can tap on-screen buttons to quickly process walk-up sales.

The Advance Sales and Daily Sales pages are the heart of an *Altru* POS system. Once everything is configured, you can use these pages to complete an entire sales workflow from one workstation. For example, you can create a sales order, process the payment, print receipts and tickets, and scan barcodes for admission, all from the Daily Sales page.



Keep in Mind...

During initial configuration, you'll need to install the Workstation Interface on each workstation that will use a cash drawer or print tickets and other sales documents. The installation utility is found on the Print setup page in *Tickets*. You can find detailed system requirements at <https://www.blackbaud.com/files/support/guides/ac/altrureqs.pdf>.

Daily Sales: Next in Line, Please

The Daily Sales page provides everything at your fingertips to quickly handle in-person sales of tickets, memberships, event registrations, and merchandise. You have sales buttons, a keypad, quick cash buttons, printing options, and an order summary all on one screen. But wait, there's more!

The screenshot shows the 'Daily Sales' interface for user 'Gail Ackbar'. It features a grid of sales buttons on the left, a numeric keypad in the center, and an order summary on the right. The order summary shows a total of \$12.84, with a subtotal of \$12.23 and taxes of \$0.61. The order includes a 'Preregistered Tour - Adult (12/17/2015...)' for \$10.00 and a 'Harriet the Hippo' for \$2.98, with a 25% Member Holiday Discount of (\$0.75).

Item	Price
Preregistered Tour - Adult (12/17/2015...)	\$10.00
Harriet the Hippo	\$2.98
25% Member Holiday Discount	(\$0.75)
Total:	\$12.84
Subtotal:	\$12.23
Taxes:	\$0.61
Tendered:	\$0.00
Balance:	\$12.84

You can also add custom buttons for the things you sell and you can arrange them on the page to best match your everyday sales workflow. For example, if you sell adult general admission tickets on a regular basis, you should create a general admission button and place it at the top of the screen for easy access. This helps to speed up sales, which means happier customers. You can do the same thing for other commonly sold items like memberships, merchandise, and event registrations. You can also set up buttons for frequently used discounts and membership promotions, and your most commonly accepted donation amounts and designations.

To customize buttons, from *Tickets*, click **Configure daily sales page**. As you set up a button, you can preview what it will look like on the Daily Sales page.

You can set each button as active or inactive. For example, if you have an annual holiday concert in December, you can mark the button active in December and then mark it inactive in January.



Did You Know?

You can set up quick marketing surveys to learn more about your patrons during daily sales transactions and use that information to build targeted marketing campaigns. When you turn on the ZIP Code survey, ticket sellers are prompted to ask for the patron's ZIP Code, if the patron is not already a constituent. You can also set up custom questionnaires to ask additional questions, such as "How did you hear about this exhibit?" or "Is this your first time visiting our museum?" To turn on the ZIP Code survey and create questionnaires, from *Tickets*, click **Configure daily sales page** and then select **Marketing surveys**.

Advance Sales: Two Tickets to Next Week's Show, Please

When patrons call ahead to register for an event or mail in an order form to buy tickets, you use the Advance Sales page to process their orders. Unlike Daily Sales, you can't customize the Advance Sales page. It's organized into three tabs to help you capture as much detailed information as possible while you are on the phone.

The screenshot displays the 'Advance Sales' interface. At the top, there are navigation tabs: 'Select patron', 'Create order', and 'Add payment'. The 'Select patron' tab is active, showing a search field with 'Eve Adamson' entered. Below the search field are links for 'Go to constituent', 'Active constituencies', and 'Memberships'. The 'Contact information' section shows the address '3382 High Point Pl, Mount Pleasant, SC 29464', phone '(843) 683-1596', and email 'eveadamson@gmail.com'. The 'Memberships' section shows a 'Multi Level Membership - LevelA (1 year)' that expires on 5/31/2016, with a 'Renew' button. The 'Members' section lists 'Eve Adamson'. On the right, the 'Order #10002267' is displayed with options to 'Apply tickets', 'Edit', and 'Delete'. Below this, the 'Delivery method - Will Call' is shown. At the bottom right, there are buttons for 'Complete', 'Pay on arrival', and 'Cancel', along with a summary table:

Total:	\$0.00
Tendered:	\$0.00
Balance:	\$0.00

- On the Select patron tab, you can search for a patron (if they've visited before) or enter a new one (if they haven't). A patron record is not required for ticket sales, but is required for memberships, donations, and event registrations. If the patron is already a member, you can renew, rejoin, upgrade, or activate their membership depending on their current status. For new patrons, enter their name, address, phone number, and email address. After you capture this information, the program creates a constituent record so you can contact them about upcoming events, promotions, fundraising, etc.

- On the Create order tab, you add the items a patron wants to purchase, such as tickets, memberships, event registrations, and merchandise. As you add items, the order summary displays the discounts, fees, and taxes that were configured to apply automatically. You can also apply manual discounts and promotion code discounts. Additional fees may apply based on the selected sales or delivery method. If necessary, you can remove a fee or tax from an order.
- On the Add payment tab, you can enter payment information for patrons who want to pay in advance. If they would rather pay for their order in person when they pick up their items, you can use the **Pay on arrival** option. The delivery method is automatically set to the default selected for Advance Sales. If you need to change the selected delivery method, you can do that here. You can also print or email their receipt.

Cash Registers: Reconcile Your Differences

There are several daily tasks you'll complete to manage the flow of purchases and donations from cash registers to bank accounts. Each day you'll need to put on your ticket seller and guest services manager hats to reconcile your cash registers and make deposits.

Start Your Day: Count Initial Cash

Good morning, Ticket Seller! For many of you, your first task in *Sales* is to use the **Count initial cash** task to enter the beginning cash balance for your register. While this step is not required, it's important to enter the initial starting cash amount if your drawer has a starting balance. At the end of your shift, *Altru* will use the initial cash amount to help identify if your drawer is over, short, or right on target. You cannot edit the initial starting cash amount once it is entered.



Keep in Mind...

When your workstations are connected to a cash drawer, the drawer opens automatically for the payment methods chosen from Print Setup in *Tickets*. If you need to manually open the cash drawer at other points in the day, you can click **No sale/open cash drawer** on the Sales page. To help prevent fraud and theft, you must enter a reason for opening the drawer.

End Your Day: The Match Game

Before you can hang up your ticket seller hat for the day, you must use the **Close drawer task** to close your drawer. You will count the total cash, checks, and credit cards and then enter that information. To prevent fraud or theft, this is purposely a “blind” process for the ticket seller to ensure there is no direct way for them to know if the drawer is over or under. The last step for you as the ticket seller is to submit your drawer for approval by the guest services manager.

Approve Closed Drawers: The Seal of Approval

You’re almost done! Now put on your guest services manager hat. After ticket sellers submit their closed drawers, the guest services manager uses **Approve closed drawers** to review all reconciliations and their associated transaction details. Digging into these details helps you to find why a drawer may be over/short on cash or why a difference appears on credit card receipts. If you need to, you can edit a closed drawer to fix any errors. After you approve the closed drawers, you are ready to create sales deposits for the bank.

Create Sales Deposits: Bank or Bust!

Now the guest services manager needs to prepare the bank deposits. Before you can generate deposit reports, you have to run the sales deposit process. You can click **Create deposits** to run the deposit process manually or you can create job schedules to run deposit processes automatically each night. The deposit process pulls information from all approved closed drawers and creates sales deposits. Payments in open, closed, or submitted drawers are excluded from the process. Payments from back office and online sales are not part of closed drawers — they must be defined on a deposit template to be pulled into the process.



Did You Know?

Before you can run the deposit process and print deposit reports, a guest services manager must create deposit templates that define which revenue sources and payment methods to associate with a specific bank account. We recommend that you create at least three deposit templates: one for back office cash and checks; a second for front office cash and checks; and a third for all credit cards payments. You can learn more about setting up deposit templates in the Treasury chapter.

Now head to *Treasury* to print the Deposit report. The Deposit report includes summary and detailed information about the selected deposits, such as payment methods, bank account information, and any corrections made to the deposit. Use this information to prepare deposit slips for the bank.

Sales Tasks: Wait, There's More!

There are several other tasks located on the Sales page that ticket sellers and guest services managers perform regularly throughout the day.

Search: Eureka, I Found It!

Altru has several sales-related searches. With the order search, you can find information about all previous orders. This comes in handy when you need to print tickets, find out who processed a sale, or refund items on an order. Use the refund search to look up existing refunds.

Refunds: All Sales Are Not Final!

Unfortunately, life happens and you may need to refund tickets for a canceled event or returned merchandise. But don't fret. In *Altru*, you can process refunds for items such as sales orders, memberships, and event registrations.

You can also partially refund portions of tickets, memberships, and preregistered program event tickets. For example, let's say you offer camps using preregistered programs. If a registrant cancels after a certain date, you can partially refund their ticket price to keep a portion of their payment as a cancellation fee. Another example is if you sold a membership to someone, but they were very disappointed in the experience they had. You could partially refund a portion of their membership.



Keep in Mind...

If you are using a Blackbaud Merchant Services account, you cannot refund a credit card transaction after 180 days. After 180 days, you must select a different method to refund the payment, such as check or cash. If you are not using Blackbaud Merchant Services, you should check with your merchant account provider to find out their time limit for refunding credit cards.

Preregistered Program Check In: The Line Up

The Preregistered program check in page provides a central location to view the preregistered program schedule for the current day and to check in program attendees as they arrive. Check in is not a required process, it simply provides a way for your organization to track attendance for your preregistered program events. You can also view a printable roster of all attendees registered for an event.



Did You Know?

On mobile devices, guest services managers can use the **Mobile Check-in** button on the Altru launch page to check patrons in to pre-registered program events.

Scanning Tickets: 21st Century Admissions

This isn't your grandma's ticket booth! If you've set up a workstation with a barcode scanner, you can scan printed daily admission, scheduled, and preregistered event tickets. This includes eTickets that were purchased online and printed at home. If you do not have a scanner or have issues scanning a ticket, you can type in the ticket number.

Before you begin scanning tickets, we recommend that you configure ticket scanning options in *Tickets*. You can set when to start and stop accepting tickets for entry. For example, you can choose to accept tickets up to 90 minutes before an event begins and stop accepting tickets 30 minutes after. If a ticket is scanned 91 minutes before or 31 minutes after, the ticket is invalid.



Did You Know?

You can also scan tickets from Daily Sales if you add the **Scan tickets** button to the Daily Sales page. From *Tickets*, you'll also need to configure when to count tickets as scanned when they are sold through Daily Sales on the day of the event.

Reschedule Tickets: Now or Later?

Patrons will sometimes will change their minds after purchasing tickets and want to swap them for an earlier or later event. Using **Reschedule tickets**, you can quickly exchange their tickets for those of the same program and price type at a different time or date. If they want to exchange their tickets for a different program or price, you'll need to process a refund.

Pick Up Tickets: For Pick Up or Delivery?

When a patron arrives at your organization to pick up tickets that were paid for but have not been printed, or are part of a "pay on arrival" order, you can use **Pick up tickets** to quickly find the order, accept the payment, and print tickets.

Batch Print Tickets: Get a Head Start

To save time and headaches, you can use **Batch print tickets** to print a group of tickets in advance for scheduled events, preregistered programs, and daily admission. For example, during a slow period of the day, you can print a batch of will call tickets needed for tomorrow. Batch printing only applies to orders with a delivery method set to deferred printing and does not include group sales or pick up ticket orders.

Reports: Show Me the Money!

As a guest services manager, you can run reports such as the Sales Report and Average Hourly Sales Report to analyze your sales. You also have reports such as the Ticket Availability Report and Preregistered Program Roster Report that you should run daily for ticket sellers so they know which programs are sold out and who's attending preregistered program events.



Sales Backtrack

Before we move on to how you can set up and manage group sales through *Altru*, let's look back at items to consider.

- There are four types of sales in *Altru*: daily, advance, group, and online sales.
- The *Sales* area has several features to help you process sales transactions and manage sales orders. You can sell tickets, merchandise, memberships, and facility rentals.
- You can connect *Altru* workstations to point of sale (POS) peripherals such as cash drawers, credit card readers, receipt and ticket printers, and barcode scanners.
- Altru* includes two sales screens: The Advance Sales page for sales made over the phone or by mail and the Daily Sales page for walk-up sales. The Daily Sales page includes customizable sales buttons, a keypad, quick cash buttons, printing options, and an order summary all on one screen. The Advance Sales is organized into 3 tabs to help you capture detailed information while you are on the phone.
- With Advance Sales, patrons can choose how they'd like to receive their purchased items — for example, they can pick up their tickets at will call or have them shipped by standard or overnight mail. Patrons also have the option to pay on arrival if they choose to pick up their tickets.
- You can accept donations in the same transaction along with tickets and other items purchased in a sales order. You can also register patrons for fundraising events.
- There are several daily tasks for managing cash registers and deposits. At the beginning of their shifts, ticket sellers count the initial cash in their registers. At the end of their shifts, they close their drawers and submit them for approval. Guest services managers then approve the drawers, run the deposits process, and print the Deposit report and deposit slips.

- Use the Preregistered program check in page to view the preregistered program schedule for the current day and to check in program attendees as they arrive. You can also view a printable roster of all attendees registered for an event.
- You can search for orders and process refunds in *Sales*. You can also search for completed refunds in case a patron has questions.
- From *Sales*, you can scan tickets for admission, reschedule tickets, complete “pick up” ticket orders, and batch print tickets.
- There are several reports available to help you analyze different aspects of sales.

For detailed information about the features discussed in this chapter, including how to perform related tasks, see the *Sales Guide* available at <https://www.blackbaud.com/howto/altru.aspx>.

CHAPTER 10

Group Sales and Facility Rentals

"I went to the museum where they had all the heads and arms from the statues that are in all the other museums."

— Steven Wright

In This Chapter...

- ▶ *Group Sales: A Thumbnail Sketch*
- ▶ *Group Sales Setup: Field Trips and Birthday Parties, Here We Come!*
- ▶ *Facility Rentals: Like Finding Money in the Sofa Cushions*
- ▶ *Group Reservations: Always Be Booking*
- ▶ *Check In Groups: We're Here!*
- ▶ *Check Out Groups: Where's Our Security Deposit?*
- ▶ *Group Reservation Calendar: This Is Command Central*
- ▶ *Group Sales and Facility Rentals Backtrack*

Which Hat Do You Wear?



The content in this chapter applies most directly to group sales coordinators. In this chapter, you learn about the setup processes for group sales and facility rentals, as well as how to book reservations, check in groups, and process group refunds.

Group sales and facility rentals are all about field trips and birthday parties. Sure, you might have a church group visit once in a while or maybe the occasional wedding reception facility rental, and those are great too. But mainly it comes down to field trips and birthday parties. And that's a good thing!



Field trips bring students in, and that furthers your mission. Same for birthday parties. If those kids have an awesome time, they tell their parents, and more birthday parties are booked. Next thing you know, these kids are all grown up and they love your organization so much, they become members. Now they're booking birthday parties for their kids. And the cycle continues.

However, before you can book all these field trips, birthday parties, church group visits, and wedding reception facility rentals in *Altru*, you'll need to perform a number of setup tasks. Like in other areas, some tasks are the "one and done" variety, while you'll do others on a regular basis.

Group Sales: A Thumbnail Sketch

Before we look at the steps to complete before you can book group sales and facility rentals in *Altru*, let's get familiar with the overall process.

During the group sales process, a patron contacts your organization and inquires about a group visit or facility rental. The group sales coordinator who fields the inquiry begins the group sales process by requesting the date and time of the visit or rental. Then they'll review the availability during the specified date and time. Next, the patron confirms the date and time, and the group sales coordinator adds a reservation.

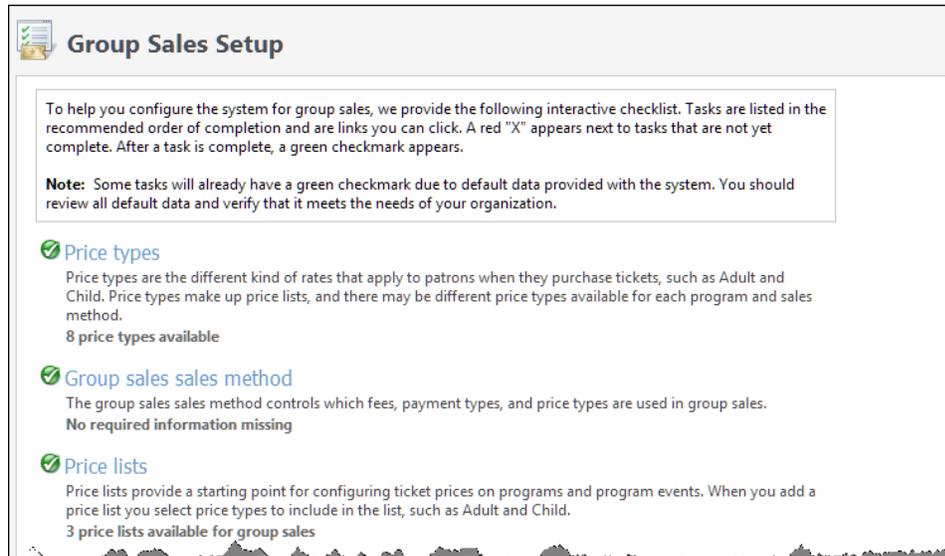
When the reservation is added, an existing patron record is selected or a new record is added. The patron is linked to the reservation. The group sales coordinator also enters a name for the reservation, specifies its contact, and enters any notes about the reservation. From the reservation record, the group sales coordinator can further define the group visit or facility rental. For example, the group sales coordinator can set up arrival information, plan the group itinerary, prepare contracts, and process payments.

When the group arrives, a check-in takes place. During this process, you can update the number of visitors in the group and add price types if necessary. You can also collect payments for any balance due and print copies of the group's itinerary so they have a schedule for the day. At the end of the visit, the group checks out and you can refund any security deposit collected from the group.

And that's it in a nut shell. Now that you have a sense of what's involved in the group sales process, let's take a look at the setup tasks.

Group Sales Setup: Field Trips and Birthday Parties, Here We Come!

To help you prepare for group sales and facility rentals, *Altru* includes a group sales setup checklist. This interactive checklist tracks the tasks you've completed and links you to each task. To get to this checklist from *Tickets*, click **Group sales setup**.



Group Sales Setup

To help you configure the system for group sales, we provide the following interactive checklist. Tasks are listed in the recommended order of completion and are links you can click. A red "X" appears next to tasks that are not yet complete. After a task is complete, a green checkmark appears.

Note: Some tasks will already have a green checkmark due to default data provided with the system. You should review all default data and verify that it meets the needs of your organization.

- ✓ **Price types**
Price types are the different kind of rates that apply to patrons when they purchase tickets, such as Adult and Child. Price types make up price lists, and there may be different price types available for each program and sales method.
8 price types available
- ✓ **Group sales sales method**
The group sales sales method controls which fees, payment types, and price types are used in group sales.
No required information missing
- ✓ **Price lists**
Price lists provide a starting point for configuring ticket prices on programs and program events. When you add a price list you select price types to include in the list, such as Adult and Child.
3 price lists available for group sales

The checklist is a suggested workflow for initial group sales configuration. The tasks appear in a specific order because some tasks build on others. While you must complete some tasks, such as adding locations and setting group prices, other tasks are optional. For example, not all organizations charge fees or taxes. The tasks your organization completes are directly related to your business processes.

Group Price Types and Price Lists: Can I Get the Group Rate?

Price types are the units used to measure attendance. During ticket sales setup, you probably add standard price types like Adult, Child, and Senior for your daily admission programs. You might also want to add price types specifically for group sales, such as Group student, chaperone, and teacher.

After you configure price types, you create price lists which provide a starting point for ticket prices on programs and program events. When you add a price list, you select the price types to include and define the base price for each type before any discounts or fees are applied. Price lists are useful if you have multiple programs that share the exact same price types and prices. You can also load a price list to one or more programs to quickly establish standard prices and then adjust specific prices as needed. Using price lists gives you flexibility to use the same price types but charge different amounts for different programs. For example, a Group student ticket to the Sea Turtles lecture may be \$8, while a Group student ticket to the Turtles Tank Tour may be \$4. For consistency, we recommend that you add all the price types you need before you create price lists.



Keep in Mind...

You can set up flat rate pricing for group reservations. For example, you might charge a flat amount for birthday parties. We'll go over flat rate pricing in more detail later.

Group Sales' Sales Method: No Delivery Needed

Patrons purchase tickets from your organization in different ways. For example, they can purchase tickets in person at a customer service desk or book a group sales reservation. The way a patron purchases a ticket is the "sales method." *Altru* includes the sales methods your organization will need, including Daily Sales, Advance Sales, Group Sales, and Online Sales. You just have to set them up for use.

Specifically, for the Group Sales sales method, you determine the valid fees, payment methods, and price types. For example, you might limit the ticket price types that can be included with group reservations to Group student, chaperone, and teacher.

With the Group Sales sales method, you don't specify valid delivery methods because delivery isn't required. Tickets for groups are not mailed to patrons or shipped overnight, and they're not picked up at will call. Instead, a group checks in when they arrive, and their visit begins from there.

More Locations: Birthday Party Here!

In *Altru*, facility rentals and programs must take place in locations that you define. You also need locations for custom items on group itineraries such as a meet and greet or lunch. Each location has address information, contact information, and location capacity. For example, if you have a specific room for birthday parties, you would add that as a location.

After you add a location, it's available for all programs and custom items on group itineraries, as well as fundraising events. In addition, you can set facility rental price for locations. For example, you might add the "Main atrium" as a location and set a rental price for wedding receptions to book that space. To add locations from *Tickets*, under **Configuration**, click **Locations**.



Keep in Mind...

The capacity you enter for a location is the maximum capacity for that location. When you schedule events or select the location for a custom item, its capacity appears. However, you can change it as necessary.

Resources: What the Group Needs, the Group Gets

In the Tickets and Programs chapter, we discussed setting up resources for program events and group reservations. For example, you can set up supplies and equipment resources such as party hats, projectors, chairs, and workbooks, as well as staffing resources like tour guides and birthday party leaders. After you add resources to the system, you can assign them to programs or group reservations. To add resources from *Tickets*, click **Resources** under **Configuration**. You add the resources on the Supplies/Equipment Resources and Staffing Resources tabs. To learn more about resources, see the Tickets and Programs chapter.

Group Types: Know Your Groups and Get Streamlined!

If you can identify types of groups that visit your organization on a regular basis, you can set up group types. For example, schools might book field trips on a regular basis, and maybe you get a frequent number of birthday party bookings. If so, you can add a School or Field trip type and a Birthday party type.

What's the benefit of setting up group types? Well, if these groups have similar resource requirements, group types help streamline the process of building itineraries on reservation. See, after you create group types, you can associate resources with each type. For example, with the Birthday party type, you might associate resources such as a birthday cake, party hats, and goodie bags. When you add a reservation and select the Birthday party type, *Altru* automatically adds those resources to the reservation.

Another benefit of group types is the ability to run reports on specific types. For example, you can run the Reservations By Group Type Report for all types or just for the Birthday party group type. To add group types, click Group types on the Group Sales Setup page.

Group Types and Resources: Make the Connection

After you add resources for groups and define group types, you can set group type resource requirements to tie it all together. During this process you associate supply and staff resources with a group types. For example, if all groups with the Field trip group type should get workbooks with each admission ticket and also be assigned three volunteer staffers, you should set the group type requirements to reflect that.

To set the group type requirements, click **Group type resource requirements** on the Group Sales Setup page.

Programs and Events for Groups: Cover All Your Bases

Outside of group sales, your organization sells tickets to daily admission programs and scheduled events. When you book group reservations, you can add these same program and event tickets to a group's itinerary. If you set up group-specific price types, the ticket prices might be different, but the programs are still the same.

Now, you may also want to add programs and scheduled events that are specific to groups. For example, you may offer a field trip-friendly education session on sea turtles for group visits. If so, you should add a program for that. Then, when you add reservations and create itineraries, you pull it in. Along the same lines, think about what programs to offer to groups above and beyond your standard programs and scheduled events and add those.

For the programs you add specifically for groups, consider the following rules of thumb. If time and capacity matter for the program, add a scheduled program. On the other hand, if the program should always be available to groups, add a daily admission program. To learn more about programs and scheduled events, see the Tickets and Programs chapter.



Did You Know?

To save time, you can copy a program rather than start with an entirely new program. A copied program retains the prices, discounts, fees, and taxes from the source.

Group Discounts and Promos: Just Like Other Deals, but for Groups

Groups love getting deals, just like other patrons who buy tickets through Advance Sales or Daily Sales. To help drive group sales and provide incentive for groups to book visits, you can offer various promotions through *Altru*. Promotions for group sales are primarily discounts that you add on the Discounts page in *Tickets*. To access this page, click Ticket and merchandise discounts under **Discounts and promotions**.

You can set up multiple types of discounts for group sales orders. These include standard discounts, required purchase discounts, and group size discounts. And when you add those discounts to *Altru*, you can set them to be applied automatically, manually, or with a promotion code. We'll talk more later about how discounts are applied during the sales and booking process.



Did You Know?

Group reservations that use the flat rate pricing structure are not eligible for discounts and promotions.

Sales Documents for Group Sales: To Print or Not to Print

Typically, when payment is received and a sale is completed through Advance or Daily Sales, a number of documents print. These documents can include tickets, itemized receipts, credit card receipts, and other stuff like Will Call headers. These are all collectively referred to as "sales documents."

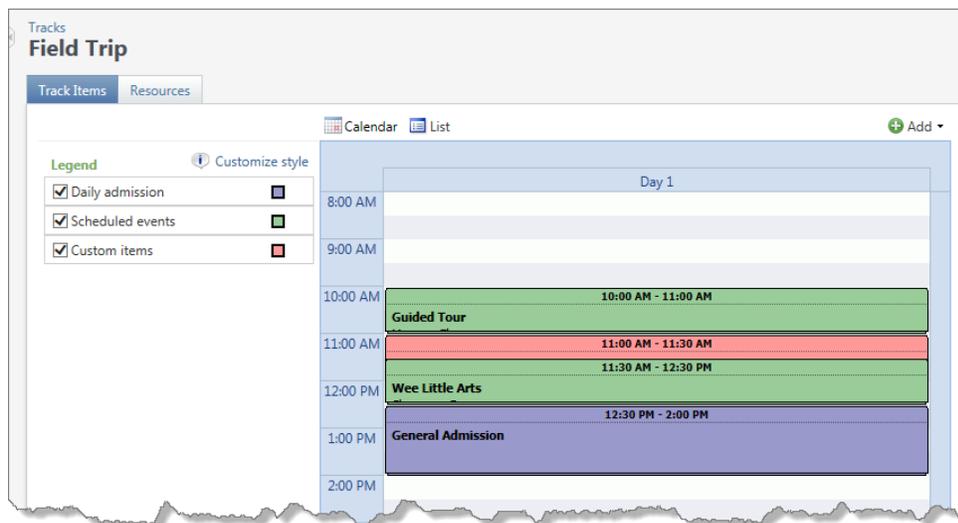
With group sales, the only sales documents that can print after payment are credit card receipts and itemized receipts. To control whether these print, you set group sales printing rules on your organization's credit card receipt template and the itemized receipt templates.

Setting the printing rules for sales documents is part of the print setup process. This is typically handled during implementation. Because setting up for printing is a pretty involved process, we provide an interactive checklist to track the tasks you've completed and link you to each task. To access the checklist from *Tickets*, click **Print setup**.

Tracks: Itineraries Made Easy

When you book group visits, you add itineraries to determine what groups do on their visits. You can add daily programs and scheduled events to an itinerary, as well as custom items such as lunch or a special tour. Later, we'll talk more about adding itineraries. For now, you just need to know what they are and how tracks can ease the itinerary process.

Tracks are basically templates you use to quickly schedule itineraries for group visits. They're especially helpful if your organization has a large number of groups that request the same type of visit. For example, if elementary schools visit on field trips multiple times each year and the itinerary is basically the same for each class, you should build a "Field trip" track to load each time you book a field trip.



You can also use tracks to streamline birthday party bookings or develop curriculum-based visits that are the same for each group. For example, your organization may put together a Birds of Prey or When Dinosaurs Roamed track that involves admission programs, scheduled events, and custom items around the theme.

To set up tracks, go to the Group Sales page and click **Tracks** under Configuration. The process to build a track is generally the same as when you schedule a group itinerary. You add a track and then add the daily programs, scheduled events, and custom items for that track. You also add resources for supplies and equipment or staff that you need. For example, if you set up a Birthday party track, you can add a birthday cake as a resource. After you create the track, you can load it when you schedule a group itinerary.

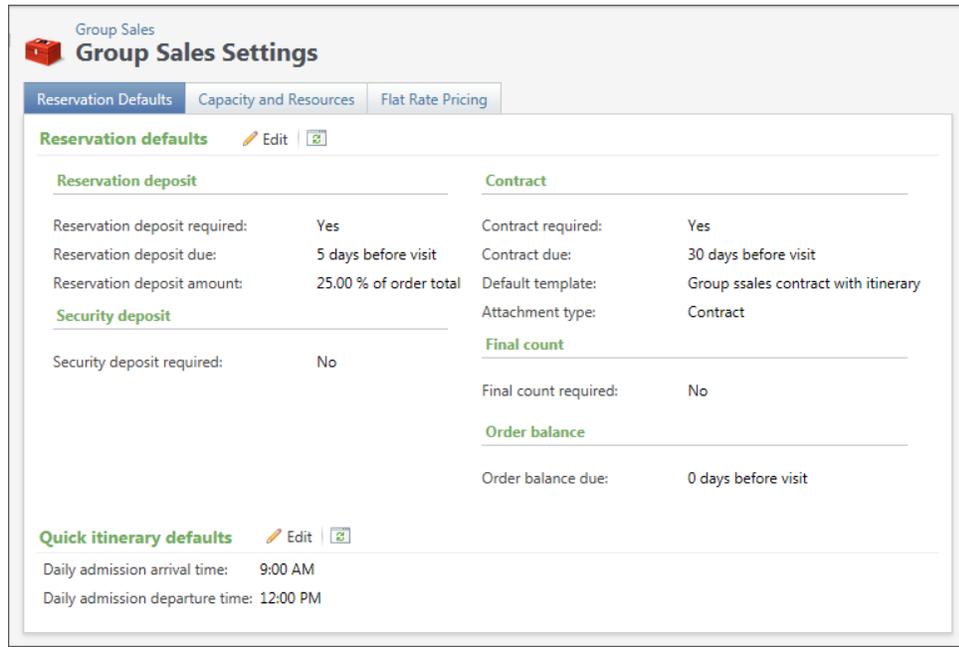


Did You Know?

If you create an itinerary that would make a good track, you can save it as a track. After you save the itinerary as a track, you can edit it from the Tracks page.

Reservation Defaults: Consistency Is King

Reservation defaults help your organization maintain a consistent policy to collect group reservation deposits, send contracts, record a group's final count, and set a due date for the order balance. You can also define default arrival and departure information to create "quick itineraries" for reservations. No worries; you can edit default information during the reservation process.



Reservation and Security Deposit Defaults

You can collect two types of deposits during the group sales process: reservation deposits and security deposits. To help maintain consistent policies for deposits, you can set defaults for each.

- A reservation deposit is an amount or percentage you charge to hold a reservation. It's a good-faith offering. You can make reservation deposits required by default on group orders and you can determine rules to calculate the deposit amount and due date.
- A security deposit is held until the completion of a group's visit and can be refunded if all facilities and property are maintained during the visit. If damage is done to the facility, a portion of the deposit can be retained. For example, if there's cake mashed into the carpet in the birthday party area, your organization might retain a portion of the deposit for steam cleaning.

Just like with reservation deposits, you can require security deposits by default. You can specify whether it's a percentage of the order amount or a flat amount. You can also set rules to calculate the due date based on the order creation date or the date of the group visit.

You can change reservation deposit and security deposit defaults during the group sales process. They're not set in stone, rather just defaults to help maintain a consistent policy to collect deposits for group orders.

Contract Defaults

Some organizations send contracts to formalize and confirm group orders. If your organization uses contracts as part of your group sales process, you can make them required by default.

In addition, if you use a specific contract template for most contracts, you can set that template as the default on all group reservations. You can also set rules to determine the due date for receiving contracts. We'll talk more about setting up your contracts later on.

Final Count Defaults

When an organization books a group visit, they provide the number of planned attendees. In many cases, the number of attendees changes prior to the actual visit, which affects the cost of the visit and the capacity available for other reservations. To help avoid capacity issues and to make sure the group is aware of the actual cost of their visit, many organizations set a deadline for the "final count" of attendees.

To make sure you receive a group's final count, you can make it required by default for group reservations. If required, you set rules to calculate the due date based on the order creation date or the date the group visit occurs.

Order Balance Payment Defaults

You can set rules to determine when the order balance is due for a group reservation. You can require the final payment to be due on a specific number of days before the visit, after you create the order, or after you receive the deposit.

If you don't set defaults for when the order balance is due, the default will be "0" days before the event, which means it's due on the day of the event.

Quick Itinerary Defaults

With a "quick itinerary" you can add a single itinerary item for a group visit when you add a reservation. This is helpful if you commonly process group reservations with a single itinerary item such as a daily admission program.

If you use quick itineraries, you can set default arrival and departure times for a group when a daily admission program is selected in the **Quick itinerary** field on a reservation. These defaults apply only when you select a general admission program. If you select a scheduled program event, the arrival and departure times are based on the start and end times of the event.

Flat Rate Pricing: One Price to Rule Them All!

The cost of a group order is calculated per ticket, flat rate, or a combination of both. With per ticket pricing, the cost of a group visit is based on the number of tickets in the order, and the ticket prices in the price lists associated with the programs. Per ticket pricing is the default pricing structure for group sales.

Flat rate pricing is an alternative to per ticket pricing that allows you to charge a flat amount for group visits. At least one rate scale must be created before you can use flat rate pricing for group reservations.

You can also combine flat rate and per ticket pricing. If a group exceeds the number of people for the highest flat rate scale, you can allow the group to pay on a per ticket basis for each additional attendee. For example, if you set a flat rate scale of \$200 for groups up to 20 people and a group has 22 attendees, rather than charge a separate flat rate for groups over 20, you can charge the group on a per ticket basis for the two additional attendees.

You can set the default pricing structure for group reservations to be flat rate or per ticket pricing. Regardless of the default, you can edit the pricing structure when you add the reservation.

Rate Scales

To configure flat rate pricing, you set up rate scales to determine prices. You can set different prices within a rate scale for different size groups. For example, you can add a rate scale that charges \$200 for groups of up to 20 people, \$400 for groups of 21 to 50 people, and \$800 for groups or more than 50 people. Or you can set up a rate scale to simply charge all groups a standard price regardless of size.

When you add a rate scale, you can define default applications that determine how to apply a flat rate to the programs, fees, and resources in a group order. These are defaults only and can be changed as needed on each group reservation. Applications ensure that all items and services are accounted for properly. For example, if a group pays a \$500 flat rate for a group visit that includes three different programs, you must determine how that \$500 is split and applied to the three programs. You can edit the default applications on each rate scale record.



Did You Know?

If you use one rate scale for most flat rate group orders, you can make it the default. When you add a group reservation that uses the flat rate pricing structure, the default scale is automatically selected. If a group order needs a different rate scale, you can select it when you add the reservation.

Capacity Constraints: Let Me In!

With capacity constraints, you set the maximum number of people allowed to visit your organization per day via a group reservation. This capacity constraint only limits attendees for group reservations and has no impact on advance or walk-up sales. For example, you know your staff and the facility can handle up to 500 people in one or many groups per day, so you set the maximum at 500. When you create group sale reservations, you can then see how much capacity is available for each day.

Contract Templates: Do We Have a Deal?

Some organizations send contracts to formalize and confirm group orders and facility rentals. If your organization uses contracts as part of your group sales process, you must complete a number of tasks before you can create personalized contracts to send to groups who book reservations. And when we say personalized, we mean it! Along with group order information that is automatically pulled into contracts, you can include any text you want, like stuff that adds a personal touch.

That said, contracts are optional. If you want to make things official and use contracts, your first step is to edit the preconfigured contract templates. Each template is a mail merge document created in Microsoft *Word*. The templates use data fields that are included in the body of the contract letter to pull specific order data from your database and display it in the contract.

There are multiple templates in *Altru* and each has a specific purpose or provides a different level of detail.

Group sales basic contract. This is a standard contract template that includes your organization name and contact information, the patron's name and address, and the group contact's name, address, and phone number. The template also includes the group reservation date, planned arrival time, and number of buses expected. This template also includes the deposit amount, deposit due date, final count due date, order total, and order balance due date.

Group sales contract with itinerary. This contract template includes all the reservation information in the basic contract, plus itinerary details.

Group sales contract with itinerary and resources. This contract template includes all the reservation information in the basic contract, plus itinerary details and any resources booked for the reservation.

Facility contract. If your organization books facility rentals, you can use this contract template. This contract template includes all the reservation information in the basic contract, plus the reservation date, specific facilities booked, and any resources required.



Keep in Mind...

Security deposit fields are not included in the default contract templates. If your organization uses security deposits and wants to include the amount required, due date, balance in your contracts, you should add those fields to your contract templates manually.

You're not locked into fields in a template. If your organization does not track information as part of your group sales process, you can remove it from the contract template. For example, if you don't require a deposit or final count, you can remove those items from the template.



Did You Know?

After you set up templates for your contracts, you can set default settings. With the default settings, you can require a contract for all group orders and set defaults to determine when a signed contract is due. You can also select a default contract template.

Facility Rentals: Like Finding Money in the Sofa Cushions

To generate revenue, many organizations rent out space within their facilities for events such as weddings or corporate meetings. Facility rentals are handled within group sales and use the same mechanisms that are used to book and process group visits.

A facility rental starts as a standard group reservation. The due date requirements for traditional reservations can also apply to facility rentals. You can require a reservation deposit, security deposit, and contract, and you can set due dates for each. You can also require the final count and order balance by a specific date.

After you add a reservation, you can add a custom item for the specific rental period to customize the group itinerary. On the custom item, you select the location. If you previously set a default facility price for the location, the price automatically appears. If not, you can enter the price as necessary.

Typically, reservations for facility rentals include only single itineraries with custom items used to book locations within your facility for a specific period of time. Although this is the most common situation, a reservation for a facility rental can also include scheduled event tickets or admissions, resources, and other custom items. If no tickets are included in the reservation, the pricing structure on the reservation does not apply. Instead, pricing is based on the price associated with the location.

Get Ready for Facility Rentals

If your organization offers facility rentals, you'll need to complete a number of preparation tasks to get started. The following checklist gives you the rundown.

- If your organization uses contracts as part of your facility rental process, you must complete a number of setup tasks before you can create personalized contracts for facility reservations.
- To standardize the price for rentals and save data entry time when you book the facility, we recommend that you configure default prices for the locations you rent.

- Add a Facility rental attendee price type for the Group Sales sales method and do not associate it with any price lists. The cost of a facility rental is determined by the price of the location, not a price list. A price type specific to facility rentals is required when you add an itinerary to a reservation. During this process, you must select a price type and enter the number of expected attendees.
- If your organization uses group types, add a Facility rental group type. Group types are categories for reservations. After you set up group types, you can assign them to your reservation itineraries and report on them. You can also associate specific resources with group types to streamline the assignment of resources on reservations for that group type.

Group Reservations: Always Be Booking

A group reservation is the central hub for information about a group visit or facility rental. Initially, you add a group reservation record to track basic information about the visit or rental, including the date and contact person. During the group sales process, you add itineraries, enter arrival information, and process payments from the group reservation record.

Add Reservations

You add a group reservation for a visit or facility rental. When you add a reservation, you enter the date and time for the visit or rental and link a patron to the reservation. You also enter a name for the reservation, specify a person to contact, and enter any notes about the visit or rental. Typically, a group sales coordinator books group reservations.

When you add a reservation, you select whether to use per ticket or flat rate pricing to calculate the cost of the order.

- With per ticket pricing, the cost is calculated based on the number of tickets included in the order. The price lists associated with the programs determine the cost of each ticket.

- With flat rate pricing, the amount charged for the order is determined by a rate scale. If you select Flat rate, you also select the rate scale to use.



Keep in Mind...

The pricing structure on a reservation applies only to tickets in the order. It does not apply to facility rentals. Instead, pricing for a facility rental is based on the price of the location. The location and price are set on a custom item added to the reservation itinerary.

During the reservation process for a group visit and facility rental, you can determine the amount and due date for the reservation deposit and security deposit, as well as the due dates to receive the contract, final count, and order balance. If your organization sets up reservation defaults, then the reservation and security deposit, contract, final count, and order balance due dates are automatically calculated based on the default settings.



Did You Know?

When you add a group reservation, you have the option to enter price types and quantities for the tickets in the order. If you enter the ticket quantity and price types on the reservation, an itinerary automatically appears in the **Manage itineraries** section of the reservation record.

After you save a reservation, the reservation record appears. From this record, the group sales coordinator can configure arrival information, manage the group itinerary, and process payments to further define the visit or rental.

The screenshot shows a reservation record for 'Ackbar' with the following details:

- Reservation summary:** Who reserved it: Nikki (on 3/23/2016); Booked/sold to: Gail Ackbar; Contact: Gail Ackbar; Contact info: gail@blackbaud.com ((800) 555-8687); Total visitors: 14; Order #: 10002312.
- Pricing:** Total: \$230.80; Pricing structure: Per ticket; Subtotal: \$218.00; Taxes: \$12.80 (Remove); Amount paid: \$0.00; Balance: \$230.80.
- Important notes:** (Empty field)
- Payments (0):** Add | More
- Manage itineraries (1):** Add | More

Schedule Itineraries

Itineraries are how you schedule things for a group visit. When you add a group itinerary to a reservation, you enter a name for the itinerary and specify a group leader. You also enter the number of visitors and select ticket price types. You schedule group itineraries in the **Manage itineraries** section of a reservation record.

After you add an itinerary, you can schedule the daily programs and events the group will attend. You can add custom items to schedule things other than daily programs and program events. For example, you can use custom items to schedule facility rentals, meals, gift shop visits, and informal tours. If a group requires additional resources, supplies and equipment, or staffing, you can schedule resources. For example, you assign wheelchairs to the itinerary for a group to use during the visit.

For each reservation, you can add multiple groups with different itineraries. For example, an elementary school may have a single reservation with three group itineraries, for three classes. To accommodate all three groups, the events on each itinerary may be entirely different or simply scheduled at staggered times. If an additional class attends, you can add a group itinerary on the same reservation record.

Where Do Tracks Fit In?

Earlier this chapter, we talked about tracks and how they're like templates to schedule itineraries for group visits. You can load a track to a group itinerary to quickly schedule stuff for the group's visit. If you recall, tracks are especially helpful if your organization gets a large number of groups that request the same type of visit or to develop curriculum-based visits, like for school field trips.

After you set up tracks, you can use them when you schedule itineraries for reservations. Rather than add each item again and again to itineraries, you can simply load a track.



Keep in Mind...

When you load a track for a group itinerary, all daily admission programs, program events, custom items, and notes in the itinerary are overwritten.

Apply Group Sales Discounts and Promos

During the group sales process, you can manually apply discounts and promotions to reduce the price of a group reservation. Automatic discounts are calculated and applied to eligible group orders when items and itineraries are added to reservations. To apply a manual discount, you select one from a pre-configured discount list, enter a valid promo code, or enter a custom adjustable discount.



Did You Know?

Discounts calculate each time you add new itineraries, change the number of attendees, or add or remove daily admissions or scheduled events for reservations.

You can apply a manual discount as the only discount on a purchase, or you can apply it along with other discounts. For example, a group books a visit to the Sea Turtles lecture, and presents a AAA membership card to receive a \$1 discount for each ticket. The order also qualifies for an automatic discount of 10% off the entire order. After both discounts are applied, each ticket receives the \$1 AAA discount and 10% is taken off the total price.

If a valid promotion code is presented, you can enter the code to apply a discount. You can also enter a custom adjustable discount to take a specific amount or percentage off the order. Like other discounts, you can apply promotion codes and custom adjustable discounts as the only discounts on a purchase or along with other discounts.



Keep in Mind...

Group reservations that use flat rate pricing are ineligible for additional discounts and promotions.

Reservation Payments and Order Status

When you add itineraries to a group reservation, you enter the number of attendees and select price types. To define each itinerary, you can also add the daily admission programs, scheduled events, and custom items that the group will attend. After you set the attendees, select price types, and build the itinerary, a total price is calculated and appears on the group reservation under **Pricing**.

The screenshot displays a software interface for "Group Sales" under the name "Ackbar". At the top, it states "This trip is scheduled to occur 6/11/2016". The interface is divided into several sections:

- Reservation summary:** Shows who reserved it (Nikki on 3/23/2016), who booked/sold it (Gail Ackbar), contact information (Gail Ackbar, gail@blackbaud.com, (800) 555-8687), total visitors (14), and order number (10002312).
- Pricing:** Shows a total of \$230.80, a subtotal of \$218.00, and taxes of \$12.80. The amount paid is \$230.80, resulting in a balance of \$0.00.
- Payments (1):** A table with one entry: Date 3/25/2016, Payment type Cash, Amount \$230.80.
- Refunds (0):** An empty table.
- Amounts and due dates (3):** A table with three entries, all marked with a green checkmark: Contract (5/12/2016), Reservation deposit (6/6/2016), and Order balance (6/11/2016).
- Manage itineraries (1):** A table with one entry: Gail Ackbar as the leader for a "Child's Birthday..." group type.
- Admission and programs - \$128.00 (2):** A table with two entries: Daily Ad... (4 at \$12.00) and Daily Ad... (10 at \$8.00).
- Supplies/Equipment resources - \$90.00 (4):** A table with four entries: Party Platter, Balloons, and Cake, all scheduled for 6/11/2016 from 10:00 to 12:00.

After you add itineraries and calculate the price, you can add payments to the group order in the **Payments** section. Any payment added to the order is applied to the deposit until the deposit is met. All payments received after the deposit is met are applied to the order balance. You can also add payments for the group's security deposit if one is required.

When you satisfy a requirement for an order, a green checkmark appears beside the requirement in the **Amounts and due dates** section of the reservation. For example, if the deposit is met, the contract is received, and the balance is paid, a green checkmark appears beside the deposit, contract, and order balance along with the date completed.

As the requirements are completed, the status of the group order changes from pending to tentative to confirmed to finalized. You can also manually change the status of the order.

Cancel and Refund Group Reservations

If a group books a reservation with your organization but can't attend, you can cancel the reservation and process a refund before check-in. Cancel and refund are two separate processes, as some organizations have a "no refund" policy but still need to cancel reservations.



Hold Up!

You cannot refund group reservations with a status of Complete. When a reservation has a status of Complete, the group has checked in at your organization.

What's a typical group refund scenario look like and how does the refund process happen? Well, check it out. If a third grade class from Washington Elementary has a case of the measles and must cancel their visit, the group contact calls your organization to cancel and request a refund of the deposit amount. To process the refund request, the group sales coordinator can access the reservation record and delete or edit the payment to provide a partial refund.

If a group has paid the balance on the reservation, it can also be refunded. In most cases, however, the group pays the balance on the reservation during the check-in, so full payment refunds are not common. If a group has checked in but has fewer guests attend than they originally paid for, you can choose whether to provide a partial refund or to keep the overage.

Check In Groups: We're Here!

When a group arrives at your organization on the day of their visit or facility rental, they must check in. During this process, you can update the number of visitors in the group and add price types if necessary. When you adjust the number of visitors or edit price types, you can keep the original order balance or update the balance to reflect any differences in cost. To check in groups from *Sales*, access the Group check in page.

Group Check In - 3/24/2016

Reservations (226) More ▾

Date: All dates From: 1/4/2016 To: 1/4/2016 Include checked in groups Apply Reset

Name	Arrival time	Number of visitors	Arrival date ▾
Ackbar	10:00 AM	14	7/2/2016

View report

Ackbar

Patron: Gail Ackbar
Visit time: 10:00 AM - 12:00 PM
Number of visitors: 14

Order

Status: Tentative
Balance: \$230.80

Contacts

Reservation contact: Gail Ackbar - 800-555-8687
Transportation contact:

Arrival

Number of buses: 0
Arrival area:

When you check in a group, you can also view resources for the order, check for conflicts, and make any necessary changes. If a balance is due, you can open the reservation record and process the final payment. In addition, you can print copies of the itinerary for the group. After you check in a group, the order status changes to Complete.



Keep in Mind...

You cannot change items on an itinerary after a group checks in. For this reason, many organizations wait until the group finishes their visit and leaves before they check them in.

Check Out Groups: Where's Our Security Deposit?

When a group completes their visit, they must check out to get their security deposit back. It's common to require a security deposit for group visits or facility rentals, especially for birthday parties or reservations that involve resources like projectors and other breakable gear. To check out groups from *Sales*, access the Group check out page.

If you collect a security deposit when groups visit your organization, you must refund or withhold the security deposit to fully check the group out at the end of the visit. For example, if a group leaves without incident, you refund the security deposit in full. However, if the kids at birthday party had a food fight and mash cake into the carpet, your organization might keep a portion of the security deposit to cover cleaning costs.



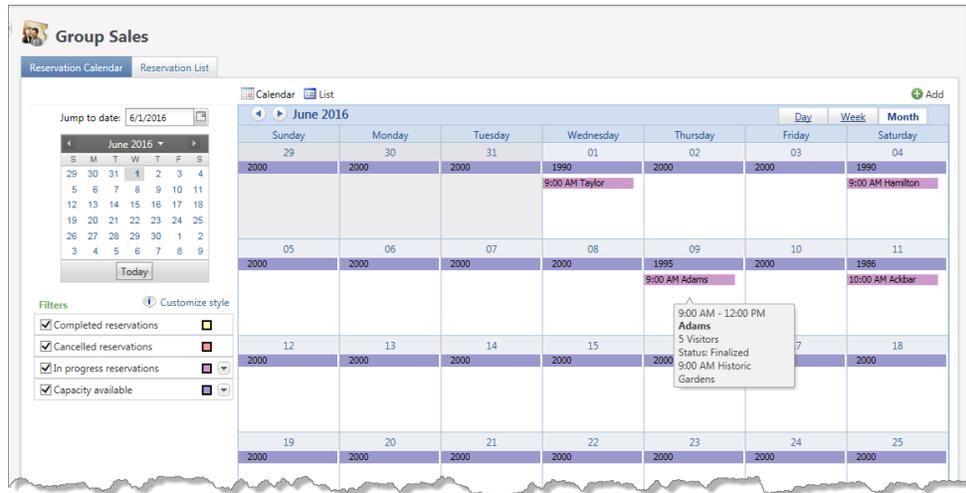
Keep in Mind...

Only groups that have paid a security deposit will need to check out. The entire check out process is used only to review the facilities or items requiring a security deposit and then provide a way to refund the deposit.

Group Reservation Calendar: This Is Command Central

The group reservation calendar is your starting point to process group ticket sales and facility rentals. It's like headquarters for group sales coordinators.

On the calendar, you can add or cancel reservations. You can also open existing reservation records to perform additional tasks to schedule itineraries, change order status, and adjust arrival details. You can also use the calendar to stay on top of expected arrivals and future bookings. To view the calendar from *Sales*, click **Group Sales**.



By default, the group reservation calendar displays all in-progress, completed, and cancelled group reservations. However, you can filter the calendar to display only past due or cancelled reservations or reservations with a specific status. You can also view the number of available tickets based on capacity constraints.

Lastly, you can select the colors used to display specific items on the calendar. So if you don't like the default colors, just click **Customize style** and go crazy!



Did You Know?

To change the visit date of a reservation on the calendar, you can drag and drop the reservation to a different day. When you move the reservation, the Change visit date screen appears so you can check for conflicts before you save.



Group Sales and Facility Rentals Backtrack

Before we move on and learn more about managing revenue transactions in *Altru*, let's look back at some key concepts and important items to consider when it comes to group sales and facility rentals.

- With *Altru*, you can book group reservations for facility rentals and group-related visits such as field trips and birthday parties.
- To help prepare for group sales and facility rentals, *Altru* provides a group sales setup checklist. This interactive checklist guides you through tasks and tracks your progress. To access this checklist from *Tickets*, click **Group sales setup**.
- Price types are the different rates you charge for tickets. For example, Adult, Child, and Senior are common price types. If you offer group sales, you might also want to add price types related to groups such as Group student, Group chaperone, and Teacher price types.
- You can set up flat rate prices for group reservations. For example, you might charge a flat amount for birthday parties.
- With the Group Sales sales method, you don't specify valid delivery methods because tickets for groups are not mailed or picked up at will call. Instead, groups check in when they arrive at your organization.
- To identify categories or types of groups that visit your organization on a regular basis, you can set up group types such as Field trip and Birthday party. To streamline itinerary scheduling, you can then associate common resources to each group type.
- For the programs you add for groups, consider these rules of thumb: If time and capacity matter for the program, add a scheduled program. If the program should always be available, add a daily admission program.

- Tracks are itinerary templates to quickly schedule itineraries for group visits. They're especially helpful if your organization has a large number of groups request the same type of visit.
- If your organization uses contracts as part of your group sales process, you can create personalized contracts to send to groups who book reservations.
- To generate revenue, many organizations rent out space within their facilities for events such as weddings or corporate meetings. Facility rentals are handled within group sales and use the same mechanisms to book and process visits.
- A group reservation is the central hub for all information about a visit or facility rental. Initially, you add a group reservation to track the basic information about the visit or rental, including the date and contact person.
- To schedule the things a group will do during a visit, you add itineraries to a group reservation. After you add an itinerary, you can schedule the daily programs and program events the group will attend.
- To reduce the price of a group reservation, you can manually apply discounts and promotions. Automatic discounts calculate and apply to eligible group orders when you add items and itineraries to reservations.
- Group reservations that use the flat rate pricing structure are ineligible for additional discounts and promotions.
- If a group books a reservation with your organization but can't attend, you can cancel and refund the reservation. Cancel and refund are two separate processes because some organizations have a "no refund" policy but still need to cancel reservations. If a group checks in but has fewer guests than they originally paid for, you can choose whether to provide a partial refund or to keep the overage.
- When a group arrives at your organization for a visit or facility rental, they must check in. During this process, you can update the number of visitors in the group and add new price types as necessary.

- ❑ The group check out process is needed only for groups that have paid a security deposit. During check out, the facilities or items that require a security deposit are validated, and the appropriate deposit refunded.
- ❑ The group reservation calendar is your starting point to process group ticket sales and facility rentals. It's like headquarters for group sales coordinators. From the calendar, you can add or cancel reservations and open existing reservation records to perform tasks.

For detailed information about the features discussed in this chapter, including all group sales setup processes and daily tasks, see the *Sales Guide* at <https://www.blackbaud.com/howto/altru.aspx>.

CHAPTER 11

Revenue

*"We make a living by what we get, but we make a life
by what we give."*

— *Winston Churchill*

In This Chapter...

- ▶ *Revenue Transactions: Money, Gifts, and IOUs*
- ▶ *Revenue Processes: Keep the Money Flowing*
- ▶ *Revenue Communications: Money Talks*
- ▶ *Revenue Backtrack*

Which Hat Do You Wear?



The content in this chapter applies most directly to data entry personnel, directors, and users who manage financial and treasury accounting, fundraising efforts, events, and memberships. In this chapter, you learn about revenue transactions for donations, pledges, and other commitments. You learn about payments and the applications of this revenue. You also learn about processes used for financial reporting and how to write off pledge installments. You can also set up processes for credit card and direct debit transactions and to communicate with constituents about revenue through acknowledgements, receipts, and reminders.

So you've created the fundraising hierarchies and designations necessary to meet your mission and goals; you've set up your financial reporting; you've built up your constituent database with prospective donors; and you've carefully crafted and sent your appeal communication to a targeted audience. And now, as a result, your hard work is literally paying off, with donations and promises of future charitable contributions. As you receive these revenue transactions, you'll need to record them in the database. Not only is it proper (and auditable!) accounting practice, but it also ensures constituents receive recognition and acknowledgement for their donations and fosters your relationships with them.



Hold Up!

Before you can enter a revenue transaction into the database, your organization must do some up-front setup. You'll need to create your designations in their fundraising hierarchies and set up your Treasury to track the bank accounts where your organization makes deposits. After you set up this information, you can confidently add and track the revenue you receive. You can find more information about this configuration earlier in this guide!

Revenue Transactions: Money, Gifts, and IOUs

After the money starts to roll in, it's time to enter records of the revenue into the database. There are several types of transactions you can work with. You might receive an outright donation, the promise of a future donation, or a combination of the two with a donation as the first payment of a recurring gift.

There's a saying that "A bird in the hand is worth two in the bush." Well, let go of that poor bird, and don't demean those two in the bush. True, an outright donation that provides cash in hand looks better on your bank balance, but don't discount the promise or commitment a constituent makes to your organization. In terms of proper accounting and constituent recognition, you should treat all revenue transactions — donations, commitments, or otherwise — with the same level of attention.

Remember how you took the time and effort to build that fundraising hierarchy and its designations at the start? When you add a revenue transaction, you select the designation it applies to. For a commitment such as a pledge or recurring gift, when you later add one of its installments or payments, the program automatically assigns that revenue toward this designation (although you can edit this information if necessary).

When you add a revenue transaction, you can also select whether to send an acknowledgement letter to thank the constituent for the revenue. (Not only is it good manners to say Thank You, but there are implications in terms of the constituent's taxes as well). For a commitment with an installment schedule, such as a pledge or recurring gift, you can select whether to send a reminder to the constituent as a head's up when an installment is past due or when you're going to withdraw funds through an automatic payment.

Pledges: Promises and IOUs

A pledge is a commitment to donate a specific amount to your organization at some point in the future. It might be the promise of a one-time future gift or a series of installments toward a large sum amount over time. From *Revenue*, you can add pledges as you receive them, such as through a phonathon or appeal communication.

Your organization may classify pledges in a variety of ways to meet your needs. From *Revenue*, you can set up these classifications as "pledge subtypes". Then, when you add a pledge, you can select its applicable subtype to categorize it correctly. You can also set up how to handle pledge payments that are larger than the scheduled installment amount... Do you want *Altru* to apply the overpayment amount to the next installment? Or to the final scheduled installment to reduce the overall pledge balance?

When you add a pledge, you set up its installment schedule. Is the pledge for a single installment, toward a future one-time gift? Or for a series of installments, received at regular (or irregular) intervals, that add up to a large total amount? When you set up the schedule, you select its frequency, starting date, and the number of installments in which to break down the total amount pledged. *Altru* automatically sets up the installment schedule based on this information, but you can edit it such as if the constituent requests to pay larger amounts for specific installments than others.



Did You Know?

To ease the burden of the constituent and help ensure you receive pledge installments, we recommend you set up automatic payments for installments by credit card or direct debit. To process a direct debit transaction for a constituent, you must enter the bank account on the Revenue tab of the constituent's record, under **Accounts**.

In the case where a constituent cannot fulfill the promise, you can “write off” a pledge to reduce its balance. You can write off the entire balance or a specific amount. It is important to write off pledge amounts to maintain accurate constituent recognition and projected revenue amounts. You can write off a pledge individually, or you can run a global pledge write-off process to reduce the balance of multiple pledges at one time. When you write off a pledge, you must select the reason for the write-off. To meet your specific needs, your organization sets up the reasons you write off pledges.

Recurring Gifts: Gifts That Keep on Giving

A recurring gift is another type of commitment. Whereas a pledge is a promise to donate a specific sum amount, a recurring gift is a promise to donate a specific amount at regular (typically monthly) intervals. A recurring gift may have an undetermined end date, or it may be an agreement to make regular donations over an extended period of time. You can use recurring gifts to recommend constituents routinely give small amounts that may not make much of an impact of their monthly finances but add up to sizable giving amounts over time.

Much like when you add a pledge, when you set up a recurring gift, you enter the payment amount of a single installment and set up its payment schedule. When you set up the schedule, you select its frequency and its start and end dates. We recommend you set up automatic payments for the recurring gift by credit card or direct debit.

From *Revenue*, you can set up how to handle recurring gift payments that are larger than the scheduled amount. *Altru* can keep the scheduled installment amounts as is, or it can update the installment amounts to match the payment amounts.

Matching Gift Claims: Bonus Checks

Your constituents' employers may provide matching gift programs as a benefit for their employees. With a matching gift program, the business offers to donate to the same charitable organizations as its employees by matching a percentage of employee donations to the nonprofit. As (potentially) the nonprofit organization in question, you might consider this your own bonus check from the company. (In other words, FREE MONEY!)

Matching gift programs vary from organization to organization. The percentage of the donation amounts the company matches may depend on the job title of the donor. Some businesses may require you to fill out and return a matching gift claim form for payment, while others may automatically include the matched amount when it deducts and forwards the donation from the employee's direct deposit paycheck. Regardless of how the matching gift program works, *Altru* can help manage your matching gift claims and get the most out of your constituents' donations.

A matching gift claim is a commitment of a donation from the matching organization, similar to a pledge with a one-time installment. Your more proactive donors may include a matching gift claim form for you to fill out with their donations to indicate your eligibility for a matching gift. However, to avoid missing out on this potential revenue, you should make it common practice to determine whether your constituents' donations qualify for a matching gift. For example, you can enter employment information for individual constituents, including whether their employers have matching gift programs.

When you qualify for a matching gift, you can add a record of the matching gift claim to the database. To help maintain your database, you can create and run processes to reconcile matching gift claims with their original, matched donations or clear unreconciled matching gift claims.

Payments: Money, Money, Money ... and Gifts-in-Kind

So far we've discussed several types of commitments — pledges, recurring gifts, and matching gift claims — that you can enter through *Revenue*. From elsewhere in *Altru*, you'll also have additional commitments such as membership renewal dues. And while all these promises of funds to come are nice, there is nothing quite like having cold, hard cash in hand. When you do receive money or revenue from a constituent, you add it to the database as a *payment*. When you add the record of a payment to the database, you track information about the money. Similar to planning a communication, it's best to take the journalistic approach and track the Who, What, When, Where, and How of your revenue payments.

- Who makes the payment
- What the payment goes toward, or its *applications*
- When the constituent makes the payment, which is important for financial accounting and analysis of the constituent's giving
- Where this transaction will appear in your financial reports
- How the constituent makes the payment, such as check, credit card, cash, or even shares of stock or real estate

Payment Applications: How You Spend It

When you add a payment, you must specify what the revenue goes toward. Is the money to pay for a commitment, such as a pledge or membership renewal, or is it a charitable donation? These uses of a payment determine how its revenue is applied, so we refer to them as the payment's *applications*. A payment may have one application, or one payment may go toward multiple applications. For example, a constituent might send in a check to pay for an

event registration and include additional funds in the check amount as a donation. Or you might receive a check that includes two donations, each toward a separate designation. In either case, you can add a payment for the check and specify how much of the total amount applies toward each application.

Payment Methods: How You Get It

Your organization may accept payments from constituents through various means. Constituents may mail in checks, some may pay with cash at the box office or a billing office, others may make a payment by credit card through your website. You can also accept other forms of payment such as the donation of sales of stock or property or of goods and services through gifts-in-kind. Regardless of you how receive a payment, you can add and track the relevant information through *Altru*.



Cash. Cash payments are made with good ol' U.S. Treasury-issued currency of bills and coins. When you add a cash payment, you can track any special codes or dates your organizations requires for cash payments, such as deposit information.

Check. When the constituent writes a business or personal check to your organization, you can add the payment as a check. When you add a check payment, you can track its check number and date.

Credit card. When a constituent provides credit card information or you swipe a credit card at a cash register or kiosk, you can add the payment as a credit card transaction. When you add a credit card payment, you can enter information about the card such as its type (Visa, MasterCard, etc.); primary account number; cardholder name; and expiration date.



Did You Know?

Payment Card Industry Data Security Standards (PCI DSS) require that you secure sensitive information such as account number and cardholder name to help prevent credit card fraud. To help you comply with PCI DSS, the program works with the *Blackbaud Payment Service* to keep credit card information secure and out of your database. You can still accept and process credit card transactions through *Altru*, but with the knowledge that the information is safely out of reach of would-be thieves.

Direct debit. Direct debit payments are those made with bank account information, such as on an appeal reply card. To accept a direct debit payment from a constituent, you must first add the bank account to the constituent's record. When you add a direct debit payment, you select from which account to withdraw funds and enter any codes or dates your organization requires for direct debit payments.



Keep in Mind...

Don't confuse a direct debit payment with one received through a debit card. A direct debit is when you receive information about an account at a financial institution, such as a checking or savings account, from which you can withdraw funds. A debit card acts like a credit card but pull funds from an account at a bank, such as a checking or saving account. To help comply with PCI DSS, treat debit card payments as credit card payments.

Stock. If your organization accepts shares of stock as a donation or form of payment, you can add the transactions as stock payments. When you add a stock payment, you can enter information about the stock, such as the company that issued the stock; the issuer's symbol from the stock ticker; the number of shares or units received; and the low, median, and high prices each unit is worth at the time of the payment. Your organization can later sell the shares and track any gain/loss amounts from the sale.

Property. Similar to stock payments, property payments are when the constituent provides land or real estate property. When you add a property payment, you can select its subtype to help categorize the property. Your organization can set up the property subtypes to best meet your needs. You can later sell the property and track any gain/loss amounts from the sale.

Gift-in-kind. When the constituent provides a good or service for which you can assign a cost or monetary value, you can add it as a gift-in-kind payment. Examples of gifts-in-kind include donated computer equipment or furniture or a no-cost consultation with an attorney. When you add a gift-in-kind payment, you can select its subtype to help categorize the gift-in-kind. Your organization can set up the subtypes to best meet your needs. You can enter additional information about the gift-in-kind, such as the item's name, whether you intend to use or sell it, and the fair market value.

Other. Consider "other" payments as the catch-all for miscellaneous means used by your organization but not explicitly managed through the program. For example, if your organization accepts payments received through Western Union or another wire transfer service, you can set up an "other" payment method of Wire transfer. When you add an "other" payment, you can select the applicable payment method. You can also enter any codes or dates your organization requires for the "other" payment method.

Revenue Processes: Keep the Money Flowing

A steady flow of revenue can be the lifeblood of any organization. To help keep the cash flow, um, flowing, *Altru* allows you to set up multiple revenue processes. With these processes, you can schedule *Altru* to automatically perform necessary tasks for revenue from behind the scenes. Not only does this help ensure these tasks get done, but it also frees you up to handle other priorities.

Global Pledge Write-off: Forgive Broken Promises

As we discussed a few pages ago, constituents can pledge to donate to your organization. Their pledges may be for one lump sum at a future date or to donate several installments that add up over time. As with any commitment, there's the potential for these promises to be broken. Your constituents mean well, no doubt, but life happens and some may need to close their purse strings when things get tight financially. Or maybe they were in a rush when talking with your fundraiser over the phone, agreed to a pledge, but then promptly forgot doing so. Regardless, if you determine that you won't be able to collect on a pledge, you can write off the commitment or its installments.

When you create a pledge write-off process, you can select the transactions to include in the process and the reason for the write-off. You can set up a separate process for each reason to write off a pledge. You can also schedule when and how often *Altru* runs the process to help keep your projected revenue totals clean of these broken promises.

Electronic Funds Transfer and Credit Cards: Payments on Automatic

Credit card and direct debit transactions make it easy for constituents to donate or make payments to your organization. However, these transactions do require some additional work before the revenue hits your bank accounts. For example, you'll have to send the credit card transactions to a processor such as *Blackbaud Merchant Services* to turn that credit card information into something you can deposit. Luckily for you, *Altru* provides processes to automate this additional work so it occurs on a regular basis with little involvement from you.

To process direct debit transactions, you have to set up your constituents' bank accounts for electronic funds transfer (EFT). This includes sending prenotifications to the constituents' banks to verify that the bank account information is set up correctly for EFT. Prenotifications do not actually pull any money from your constituents' accounts, they just make sure everything's good for when you do actually try to transfer funds from the accounts. When you do have actual direct debit transactions, you must create a transmission file to send to your organization's bank. This file contains the information required to process the direct debit transactions. Your bank then processes the file and transfers the funds from your constituents' accounts to your own.

Similarly, to process credit card transactions, you must create a transmission file to send to the credit card processor where your organization has a merchant account. For security, *Altru* sends this file to your merchant account through the *Blackbaud Payment Services*, which securely handles and encrypts sensitive credit card information to keep it out of the hands of malicious credit card thieves.

To help create these transmission files, you can create a generate payments process. This process goes through your database (or just a selection of revenue transactions, if you'd prefer) and looks for commitments that use credit card or direct debit and have installments due. It then compiles any installments it finds in a revenue batch which you can use with the processes that create your credit card or direct debit transmission files. To be clear, this transmission file does not include recurring gift credit card installments. We explain those in the next section.

You use separate processes to create the transmission files for credit cards and direct debit transactions. When you set up a credit card processing process or direct debit file process, you select a batch of transactions (like one created by the generate payments process) to include. You can also include a new batch of transactions within your database or a selection of commitments with installments due by a specific date. For information about batches and selections, see the Data Management chapter.

As with the other revenue processes, you can schedule when and how often *Altru* runs the process. For example, to really help keep your cash flow flowing, you can set up the process to run on a nightly basis to capture that day's credit card and direct debit transactions as soon as possible.

Nightly Credit Card Processing for Recurring Gifts

Credit card transactions for recurring gifts are handled a little differently. When a recurring gift (set up online or offline) has a payment due, it is pulled into a nightly credit card process. This process comes pre-configured for you and runs automatically so you don't need to worry about starting the process or creating a job schedule. To make the process more automated, you also have the option to commit the batch automatically after it processes and can receive email alerts when payments fail to process.



Did You Know?

The Credit Card Updater subscription service helps to minimize disruptions in payment processing for recurring gifts and pledges by automatically updating lost, stolen, or re-issued credit card data. The service finds expired or out-of-date credit cards and provides new card numbers and expiration dates when available from participating banks. Only organizations that process credit card payments using *Blackbaud Merchant Services* can subscribe to this service.

Revenue Communications: Money Talks

Earlier, when we discussed appeal communications, we pulled out that feel good nugget of psychology: “Effective communication is the key to all healthy relationships.” Just as when you reach out to your constituents to ask for a donation or commitment, you’ll need to continue to communicate with your donors after you add their transactions to the database. From *Marketing and Communications*, you can manage processes to thank constituents for revenue and remind donors of revenue commitments.

Acknowledgements. It’s always good to acknowledge the gifts you receive. Not only would Miss Manners say it’s proper to give thanks, but it also helps foster your relationship with the constituent and reaffirms your appreciation of their donation. You can create letters to use for acknowledgements and manage a process to generate these letters to thank constituents for revenue transactions. To help foster your relationship with constituents and encourage their continued giving, you can use multiple letters with the acknowledgement process. For example, you can create a letter with content crafted for major donors, to help provide a white-glove treatment for your high-dollar contributors; another letter geared toward members in your membership program; and a more general letter for other donors.



Keep in Mind...

So your constituents can write off their tax-exempt donations come April 15, you should include the receipt information when you create content for your acknowledgement letters.

Reminders. Everyone can use a reminder of commitments every once in a while. Much like how your dentist might send a postcard to remind you of a check-up appointment, you can send reminders to constituents to notify them when installments toward pledges or recurring gifts are past due. This can prompt constituents to send in payments for installments or alert those with automatic payments set up that you'll be making a withdraw from their credit cards or bank accounts.

As with the EFT processes, you can schedule when and how often *Altru* runs the processes to create these communications. For example, to ensure a prompt response to transactions and keep your database up-to-date, you can set up the processes to run daily.



Revenue Backtrack

Before we move on to how you can manage and get the most out of all the data you enter into *Altru*, let's review how you manage revenue transactions.

- "Revenue" refers to all payments you receive and commitments of future payments such as pledges, matching gift claims, and membership dues. In addition to monetary transactions, revenue can include contributions of stock, property, and services as gifts-in-kind.
- A pledge is a commitment to donate a specific amount to your organization at some point in the future. It might be the promise of a one-time future gift or a series of installments toward a large sum amount over time.
- A recurring gift is a commitment to donate a specific amount at regular (typically monthly) intervals. A recurring gift may have an undetermined end date, or it may be an agreement to make regular donations over an extended period of time.
- A matching gift claim is a commitment by a business to donate to your organization when an employee or individual with an applicable relationship donates to your organization.

-
- When you receive money or revenue from a constituent to apply as a donation or toward a commitment, you add the transaction to the database as a payment.
 - A payment may have one application, or one payment may go toward multiple applications. For example, a constituent might send in a check to pay for an event registration and include additional funds in the check amount as donation.
 - Constituents may use many methods of payment, including cash, check, credit card, stock, and gifts-in-kind. If your organization accepts payments through means not supported by default, you can create an “other” payment method. For example, to accept payments through a wire transfer service, you can set up a payment method of Wire transfer.
 - You can set up processes to automatically process credit card and direct debit payments, or write off pledge installments from behind the scenes.
 - To process direct debit transactions, you must set up your constituents’ bank accounts for electronic funds transfer (EFT) and send prenotifications to the constituents’ banks to verify that the account information is correct.
 - You can create a generate payments process to compile the installments due for commitments set up for automatic payment.
 - To process credit card and direct debit transactions, you must create transmission files to send to your credit card processor or financial institution.
 - From *Marketing and Communications*, you can add and manage processes to create acknowledgements and reminders for revenue transactions.

For detailed information about the features discussed in this chapter, including how to perform related tasks, see the *Revenue Guide* and *Communications Guide* available at <https://www.blackbaud.com/howto/altru.aspx>.

Revenue

CHAPTER 12

Data Management

“Information is a source of learning. But unless it is organized, processed, and available to the right people in a format for decision making, it is a burden, not a benefit.”

— William Pollard

In This Chapter...

- ▶ *Take Charge Of Your Time and Your Data!*
- ▶ *Batch: The Ultimate Time-Saver*
- ▶ *Import: Bring It On!*
- ▶ *Query At Your Fingertips*
- ▶ *Work Smarter With Smart Fields*
- ▶ *CUSTOMize Your Export*
- ▶ *Data Management Backtrack*

Which Hat Do You Wear?



The content in this chapter applies most directly to, well, just about everyone. In this chapter, you learn about batch configuration as well as data entry and management through *Batch*, *Import*, *Query*, and *Export*. If you plan to work with data management through batch entry, creating queries, using smart fields, or importing and exporting data, this chapter offers a general overview of these tasks, along with helpful tips and reminders.

Take Charge Of Your Time and Data!

Have you ever found yourself wishing for more than 24 hours in a day? We all juggle jobs, families, sports activities, social ties, and volunteer commitments. It's a wonder that we can fit it all in!

If you've ever taken a time management seminar, one request your instructor may ask of you is to list out all your responsibilities. For each responsibility, write the amount of time it takes to accomplish each task (even sleeping!). It won't take long to quickly burn through the hours... in fact, you may see more tasks than you have time for. You're either more efficient than you think or you need to hire an assistant!

Let's take this a step further and focus specifically on your efforts as a fundraiser. How do you manage your time? Whether you coordinate an event, manage volunteers, sell tickets, greet donors, mail acknowledgement letters, enter data, or print reports, proper investment of time in all of these areas can lead to successful fundraising.

Alright, we've established that time management is important. What about data management? Do they both go hand in hand? We certainly think so. When you manage your time and data efficiently, that's when you can be the best fundraiser for your organization.



With *Altru*, you can manage both your time and your data. You'll soon become more familiar with *Altru* and the way each element of the program works together to take care of your data and save you time. Essentially, taking good care of your data means being consistent and carefully considering how you want to treat all information before you begin working in *Altru*.

So what are the tools that can help you take charge of your time and data? *Batch*, *Import*, *Query*, and *Export*. These are strong data management tools that can save you time. Yes, these tools are strong, but it's important to remember their strength relies heavily on good choices that you make... especially before you begin working in *Altru*. When you plan ahead and make careful considerations, these tools work to their full potential — to help you safely and consistently move data in and out of *Altru*.

Let's take a brief glimpse into each tool before we move on.

With *Batch*, you can add or update many records at once which makes your data entry process smooth and efficient. You know the 500 or so pledges your organization received at last night's Annual Gala? This is a perfect example of why you wouldn't want to enter each of those pledges as one record at a time — just create a revenue batch and save yourself tons of time!

With *Import*, you bring information into your database. *Altru* either creates new records or updates existing records using what we call a batch template. Perhaps you have a spreadsheet of donor information that you need to add to your database. You can easily bring data from that spreadsheet into *Altru*.

With *Query*, you can filter and group records. You use filters and other criteria to ask a question, and *Query* displays results in the form of records that match your criteria.

With *Export*, you can extract pieces of information from your database and send it to another place (mainly another software application). For example, you may want to create an export file to send to a word processing program for a mailing or to a spreadsheet program for further analysis. You can also use *Export* with other program functions, like mailings, or with other software applications, such as Microsoft *Word* and Microsoft *Excel*.

Okay, who's ready to take charge? First up is *Batch*... the tool that can save you record time! In the words of Benjamin Franklin — "Lost time is never found again."

Batch: The Ultimate Time-Saver

With *Batch*, you can add or update many records at once which makes your data entry process smooth and efficient.

Let's say you need to add a batch of new constituents. You can enter many types of biographical data for each constituent, from their home address and phone number, to primary business and spousal relationships. In addition to batches filled with revenue or constituent data, you can also create batches for volunteer timesheets and fundraising event registrations. If you choose to

enter data by way of a batch or as one record at a time, the same fields are still available to you. When you have similar information, such as a group of volunteer timesheets from Saturday's Walk-A-Thon, for example, it's much easier and faster to add that information to your database in a group format using a timesheet batch.

So what does a batch look like? Well, it has the look and feel of a spreadsheet and can be configured to contain only the fields that you need to enter data into.

Batch 14

Main Revenue

Batch: Save Save and close Export

Constituent: Edit Go to

Configuration: Properties Customize fields

Processes: Validate Update projected totals

Messages: Set row message Clear row message Clear all Show all Select previous Select next Filter...

Properties

Owner: NikkiTr Projected No.: 0 Current No.: 2
Projected total: 0.0000 Current total: 265.0000

	Constituent	Lookup ID	Amount	Date	Revenue type	Payment method	Application	Designation	GL post status	Installment frequency
1	Gail Ackbar	8-10001066	\$250.00	11/23/2015	Payment	Cash	Awards Dinner registrati...		Not posted	
2	Tom Adams	8-10002362	\$15.00	11/23/2015	Payment	Cash	Recurring gift for Tom A...		Not posted	

Constituent Window

Individual Household Business Information

Personal Primary contact

Last name: Ackbar Address type: Home
First name: Gail Country: United States
Middle name: Address: 2004 Gunpowder Ct
Summerville, SC 29485
Title: Col. Phone type: Business
Suffix: Phone number: (800) 555-8687
Nickname: Email type:
Maiden name: Email address: gail@blackbaud.com
Marital status:
Birth date:
Gender: Male

Page 1 of 1

Owner: NikkiTr Current #: 2 Projected #: 0 Current amount: \$265.00 Projected amount: \$0.00

You can create defaults for certain fields. You can also hide fields that you've entered defaults for, such as the date or type of record. For example, you don't need to enter or even see the date field for the 500 pledges you need to add. When you create a new batch, you can edit the fields and defaults from the batch template to add yesterday's date as the default and hide the field.

A batch template? Yes, creating a batch template is one of the configuration items you need to address before batches can be created. *Altru* comes with a default batch template for each type of batch available. You can edit that template or create your own templates.

Once you have customized your batch templates, you use the batch template as the base for each new data entry batch that you create. After creating and entering relevant data into the new batch, the batch is considered uncommitted (not yet applied or saved to your database). When you commit (apply and save) the batch to your database, a record is created for each row of data you enter in the batch “spreadsheet.” If some rows contain edits to existing records, upon committal, those records are updated in your database.

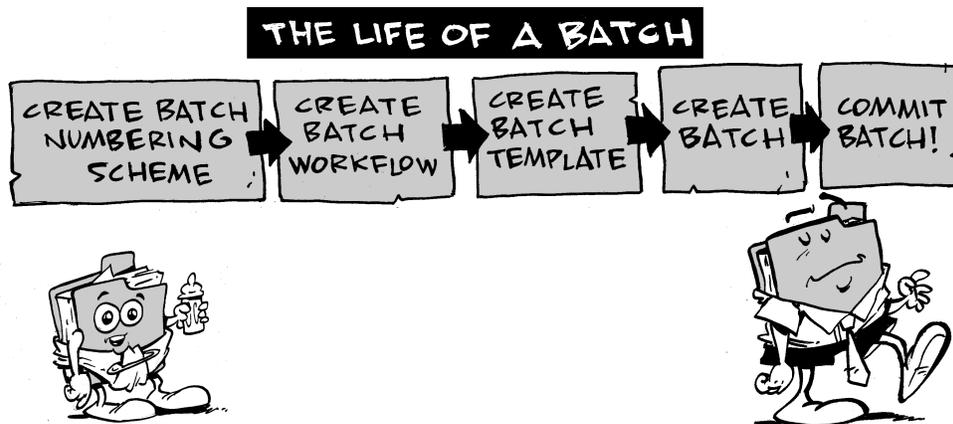


Did You Know?

Constituent batch, revenue batch, and timesheet batch are examples of batches that add new records. Other batch types, including change of address update and constituent address update will update existing records.

After the commit process, you can use several batch reports to review data you included in the batch as well as any exceptions that occurred (records that did not commit are called exceptions.).

In general, all batches follow the same life cycle. From numbering schemes to committals, your batch is very busy!



Before we explore a batch's life, let's talk about how you can access *Batch*.

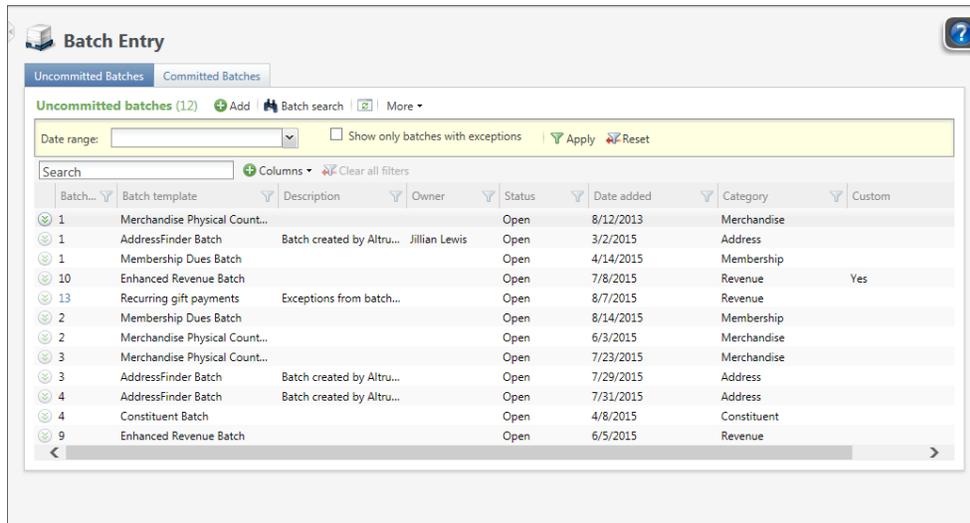
To access *Batch* from *Administration*, click **Batch**. The Batch page appears where you can specify configuration settings and manage your batches with **Batch entry**, search for a batch with **Batch search**, or commit multiple batches with **Commit multiple batches**.



Did You Know?

You can also access the **Batch entry** and **Batch search** links from the *Revenue*, *Constituents*, and *Volunteers* functional areas. These are areas where it makes sense to enter data in a batch format.

To take care of those configuration items, such as adding a batch template, click **Batch entry**. This takes you to the Batch Entry page.



In a nutshell, a batch needs a numbering scheme, workflow, and template before you can officially call it a batch. You can work with these tasks under **Configuration** on the left. So now that we're here, let's dive in!

Batch Numbering Schemes: Time to Put Things in Order!

Your first task is to create a batch numbering scheme. This determines how *Altru* will automatically generate numbers to identify a batch. The generated numbers can contain a sequence number, the date, and a user-defined label. Later, when you search for a batch, you can easily use the batch number to identify which one you want. *Altru* provides basic batch numbering schemes “out of the box” for most batch types. If these don’t work for you, you can use them as starting points for new numbering schemes that better fit your needs.

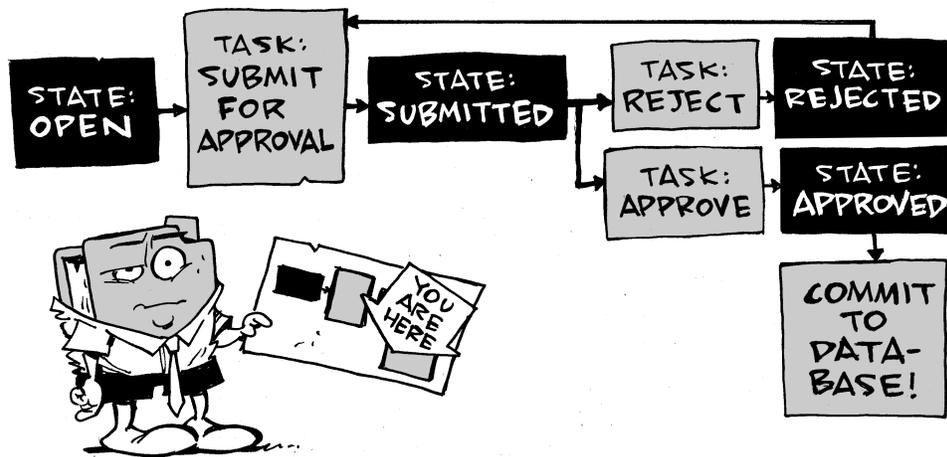


Did You Know?

After you add a batch numbering scheme to the database, you can edit its name or default settings. You can also select to restart the numbering of the next available batch number to the default sequence start.

Batch Workflows: Which Way Do I Go?

The workflow determines the states the batch must complete before its records can commit to the database (commit means to apply or save the records to your database). *Altru* provides pre-built single status/state batch workflows for most batch type — you may not need to create new workflows if these work for you. Once you have a workflow ready to go, you can create a batch template — you can't have one without the other.



Batch Templates: Time for Fields and Defaults!

Batch templates define basic information about the batch, such as fields included in the batch and default values for the fields.

When you create a batch template, you select the batch type, such as constituent or revenue, numbering scheme, and a workflow. You can also specify additional fields and defaults to use in the batch's records. Going back to our previous example of the Annual Gala, this is where you can add a default of yesterday's date for the Date field.

You can even take this to the next level and use the same batch template for multiple batches! No need to reinvent the wheel here when you have a batch template that can serve multiple purposes.

To help you work with Batch entry, *Altru* provides some basic batch templates. These batch templates provide the fields necessary to add basic information to create records. You can also use batch templates to import information from a comma-separated value (*.csv) file.



Did You Know?

In a comma-separated values file, a comma separates each piece of data. These files are also commonly called “comma delimited” or “ASCII” files.

For example, you have information about new constituents in a Microsoft *Excel* spreadsheet. You can create a business process to easily import the information from the spreadsheet into the selected batch template (more details on importing later).

Let’s review the prep work:

- Create a batch numbering scheme.
- Create a workflow.
- Create a batch template and assign the numbering scheme and workflow to the template.
- Voilà, you’re now ready to add data to a batch!

Batch Entry: It’s Never Been Easier!

You’ve completed the necessary configuration tasks... it’s time to grab your data and get started! Whether you’re entering donations, new constituents, updates to addresses for existing constituents, or volunteer hours, get ready to save yourself a ton of time!

Understanding The Uncommitted Batch

The Uncommitted Batches tab is where you begin. This will probably be your best friend in terms of where you'll spend most of your time within *Batch*. Remember, uncommitted batches have not been applied to the database. After you create an uncommitted batch, you can continue to edit the data entered in the batch or move an uncommitted batch through its workflow.

From this tab, you add new batches as well as manage all batches available for data entry. The Uncommitted batches grid holds information about your uncommitted batches, such as the number, template, and category of the batch; the current batch status and its owner; any comments entered about the batch; and date the batch was last changed. You enter all this information when you add the batch or update its status.

Depending on the workflow state of the batch and your security rights and system role, you can perform several tasks to manage your uncommitted batches. For example, you can update the status of a batch, change the batch owner or update the batch number. Perhaps you want to validate your revenue batch before you commit it. Validating is a way to view every field you've entered in a batch and its value, in the order it appears in the batch. To prevent potential issues, we recommend you view a validation report to correct any mistakes before you commit.



Did You Know?

When you validate a Constituent, Revenue Batch, Revenue Update Batch, or Enhanced Revenue Batch, the program automatically runs a duplicate check and flags any potential duplicate constituents as exceptions. You can view the incoming and existing records side-by-side to decide whether they are the same person.

If you'd like, you can also receive a notification of changes to batches via a Really Simple Syndication (RSS) feed. This feed alerts you when uncommitted batches are assigned, rejected, or approved, depending on your organization's batch workflow. Feeling powerful yet?

The Batch Form: Efficient, Effective, Experienced!

We mentioned earlier that the batch form has the look and feel of a spreadsheet and can be configured to contain only the fields that you need to enter data into. Each row on the batch form, in essence, represents a new or existing record.

Batch 14

Main Revenue

Batch: Save Save and close Export
 Constituent: Edit Go to
 Configuration: Properties Customize fields
 Processes: Validate Update projected totals
 Messages: Set row message Clear row message Clear all Show all Select previous Select next Filter...

Properties
 Owner: NikkiTr Projected No.: 0 Current No.: 2
 Projected total: 0.0000 Current total: 265.0000

	Constituent	Lookup ID	Amount	Date	Revenue type	Payment method	Application	Designation	GL post status	Installment frequency
1	Gail Ackbar	8-10001066	\$250.00	11/23/2015	Payment	Cash	Awards Dinner registrati...		Not posted	
2	Tom Adams	8-10002362	\$15.00	11/23/2015	Payment	Cash	Recurring gift for Tom A...		Not posted	

Constituent Window
 Individual Household Business Information

Personal Primary contact

Last name: Ackbar Address type: Home
 First name: Gail Country: United States
 Middle name: Address: 2004 Gunpowder Ct
 Title: Col. Summerville, SC 29485
 Suffix: Phone type: Business
 Nickname: Phone number: (800) 555-8687
 Maiden name: Email type:
 Marital status: Email address: gail@blackbaud.com
 Birth date:
 Gender: Male

Owner: NikkiTr Current #: 2 Projected #: 0 Current amount: \$265.00 Projected amount: \$0.00

The menu options on the batch menu vary depending on the type of batch you're working with. For example, from a revenue batch menu, you can specify tribute information for donations (in honor of Mr. and Mrs. Bee-Byrd's 50th wedding anniversary). On the other hand, for a new constituent batch, you may want to add solicit codes (such as "do not phone at work" so you don't mistakenly call Bob Billionaire while he's closing that international deal he's worked on for over a year!).

For revenue batches, a Constituent Window appears just underneath the data entry rows. This window displays information about the constituent and applications associated with the selected transaction.

A few additional options on this form include: validation (to ensure a batch doesn't have the same constituent entered twice, for example), setting a row message, and updating projected totals.

Go Ahead, Commit That Batch!

After your data entry and the batch workflow are complete, you can commit the batch (Objections? Speak now or forever hold your peace!).

When you commit the batch, the data you enter in the batch is used to create or update records in your database. After a batch is committed, you can view information about the data that did or did not successfully create or update records in your database.

Your committed batches now live on the Committed Batches tab. From this tab, you can view all details about a batch.



Keep in Mind...

When you commit a batch, you can create an exception batch, which contains all records that do not commit to the database. When you commit the exception batch, you can select to create another exception batch of any records that still do not commit to the database. Depending on the size of the original batch and the number of exceptions, you may generate several exception batches before you successfully commit all records from the original batch to the database.

After committal, *Altru* creates a batch commit status page where you can view the batch's process parameters, status details, control report, and exception report. The batch control report lists the records in the batch that were committed to the database and offers information about each record. Hmm, pretty useful! The batch exception report contains information about the records that didn't commit to the database and explains why each record didn't commit (not so much because of cold feet but more likely due to a declined credit card, for example).

Similar to uncommitted batches, on the Committed Batches tab you also have the option to receive Really Simple Syndication (RSS) feeds. This feed alerts you when a batch moves to the Committed batches grid.

Filtering is also helpful. You can limit the number and types of batches that appear in the grid by filtering on type and committal date. This makes looking for last week's committed revenue batches a cinch!

Quick and Easy Search for Batch

After you create a batch, you can use **Batch search** to search for and open uncommitted, committed, or deleted batches in your database. When you search for a batch, you can make the search broad or specific, depending on the type of batch you're looking for. To get the records you need, try to be selective and enter detailed information. For example, you can use the Batch number, Description, and Batch type fields to narrow your search.

Commit Multiple Batches: You're on the Fast Track!

Now that you get the concept of entering large amounts of similar data by way of a batch, let's go a step further. With *Altru*, you can create a process to commit numerous batches at once. Yes, commit them all! While you're asleep if you'd like! Talk about saving time!

From the Commit Multiple Batches page, you can create and manage things called "processes" to automatically commit multiple batches at the same time. Earlier in this chapter, we mentioned creating a business process to import data into a batch template. A process is a task you set up to run on a specific date and time. You basically tell *Altru* what to do and when to do it. You then leave work to make Happy Hour, and *Altru* runs the process for you!

Import: Bring It On

Import relies heavily on *Batch* — they truly go hand in hand (two peas in a pod, partners, friends for life... you get my drift!). When you import, or bring information into your database, you create new records or update existing records using a batch template. If you recall, we touched on this briefly when you learned about batch templates.

So what does this mean for you?

First, we understand that many times, you need to move data into *Altru* in large quantities. That's why we've designed *Batch* and *Import* to work closely together.

Second and most important, we know how vital your data is to the success of your organization. Without it, you can do nothing, send nothing, contact no one, and have zero attendance at your long-awaited events. Even if your data is skewed, you're still pretty much in the same boat — ineffective.

Maybe you've spent time cultivating lengthy spreadsheets of potential donors. In addition to names, let's say you've collected information about their likes and dislikes, the best way to contact them, and even relationship and employment data. You may have a lot of information like this in multiple spreadsheets. If so, it's time to grab your lasso and get to work! With *Altru*, you can round up every piece of data you've collected and bring it into your database in no time!



Let's take an example...

Using the spreadsheet reference from above, you've gathered important details about potential donors. You're not going to simply bring in only their names or addresses, right? It makes sense to bring in all related information about each donor at the same time — using a batch. You can import your spreadsheet into *Altru* to create new records... batch style. You first need to add an import process and select a batch template. The fields included in the batch template you choose appear in one column. The fields from the file you want to import appear in another column.

Next, you just map the fields from your import file to the fields in the batch design. Since you're bringing in data from an external application, you should think about how the fields in that application will sensibly map to the fields within *Altru*. One cool feature is that you can choose to map these fields automatically or manually. In the end, you need to ensure the values in the fields within your external application purposefully match the fields within *Altru*. Remember, for a successful import, the file you import must be in a comma-separated values (*.csv) format, such as Microsoft *Excel*.

Import is a powerful tool that can help streamline your data. If you're not incredibly organized (and you know who you are), that's okay. You now have the power to tame the chaos and get organized!

I Can Import from within Batch?

YES! From the Batch Templates page, you can create an import process (just click **Create import** on the action bar).

You can also work with import processes from the *Administration* page (click **Import**). The Import page appears where you can create import processes to apply to a batch. You can configure import options (you can't create any import without specifying an import file path first), generate an import header file, and start your import processes directly from this page.

Query at Your Fingertips

By definition, a query is just a question. We form questions to alleviate our doubt about something specific. Do you ask for directions when you're lost? Ladies are nodding, gentlemen not so much. When you want to purchase an item, if the price isn't readily available, what do you do? Okay, sighing loudly and mumbling under your breath doesn't count. Of course you wait patiently for the next available employee to willingly tend to your request!

Part of your job is to ask the right people for the right things at the right time. Suppose you were successful in previous appeals and now it's time to ask again. You can't remember the total from last year's annual Holiday fundraiser, so you confirm by querying, or asking, your database. With *Query*, you can build simple or complex questions to get the answers you're looking for.

Query helps you filter and group records. You use filters and other criteria to ask your question, and *Query* displays results in the form of records that match your criteria. If this seems intimidating to you, don't fret! *Query* is not only smart, it's friendly (after you get to know it). The following interaction from one of our readers may help alleviate some of your fears.

Dear Query,

I have tons of information in my database and when I think about forming a query, I get nervous! What if I don't word it correctly or include too much information? Listen, I'm not afraid to choose fields or even save my query (which does, indeed, frighten one of my colleagues). The fact is, I have so much data that I'm just not sure what combinations of fields to choose to get the results I want.

I love my job and I'm very dedicated. I'm just tired of wondering if my choices are the best.

*Yours Truly,
Tired of Guessing*

Dear Tired of Guessing

I understand your fear and I'm here to help! First, to your colleague: Don't second-guess yourself! A query doesn't alter your data, it just answers a question. If you don't like your question, delete it and start again.

Now, to your point. Your database can be sensitive at times but there's no need to walk on eggshells around it! It sounds to me like you just need a

bit of help deciding what fields to choose. Take a close look at the types of questions you want to ask. Are you specific? Most confusion occurs because a question isn't specific enough. Your database can't read your mind, you know. If it helps, write down your question.

Remember, if you give a lot to your query, it will give a great deal back to you.

***Your hero,
Query***

*P.S. If you need extra help and really want to learn the ins and outs about me, you should check out the latest user guides at www.blackbaud.com. You can also search **Altru's** help file for answers.*

Query is there to help you find the answer to your question. After you're successful, you can choose to save the query for future use or export that information out of your database. You may find the need to bring information out of your database to be used in a different area of **Altru** or in another application. Similar to the way *Import* relies on *Batch*, *Export* relies on *Query* because you base your export on a query. **Altru** is all about commitment and working together to save time and manage your data well!

For now, try to put aside any fears you may have about *Query*. After you review the following sections, you'll have the confidence you need to create your own queries and, if you'd like, export that information to another application.

Questions? Just Ask Query!

We'll start with five very basic, but important facts about *Query*.

1. With a query, you can group records according to the criteria you want.
2. Query groups records together; it's not a reporting tool.
3. Query does not remove records from your database or move them around within your database.

4. There are two types of queries: Ad-hoc and smart.
5. Query folders can help you save time and stay organized!

Fact 1...

With a query, you can group records according to whatever criteria you want.

Your database is filled with all kinds of great information — constituent names, birthdays, addresses, donations, appeals, and much more. Along the way, you used fields to enter the right chunks of information in the right place. You entered constituent names in the Last name, First name, and Middle name fields. You entered constituent birthdays in the Birth date field, and so on. Now it's time to ask your database to give you a list of all your constituents and their birthdays. So what do you do?

Right! You create a question, or a query, where you choose to filter through all information in your database and provide only constituent names and their birthdays. Not only do you want to filter on that criteria, you want to view your constituent names and birthdays in your output as well.

Fact 2...

Query groups records together; it's not a reporting tool.

Some people mistake *Query* for a reporting tool when it really isn't. *Query* helps you group and sort records... it provides a list of records that answers your "question."

Reports can combine data from different record sources, organize it into table structures and sometimes graphs/charts, and provide totals and summarized data in a way that query cannot. This can be helpful when you need to present your data to others in your organization.

Fact 3...

Query does not remove records from your database or move them around within your database.

If I ask you a question to which you know the answer, you filter through the information in your mind until you find the right answer for me. You can share the answer with me without permanently extracting the answer from your mind (now, wracking your brain for the right answer may cause a headache!).

You tell *Query* what fields, also called criteria, you want to see. *Query* asks your database for the values of those fields and presents those values to you. You can create the most basic query to the most complex... a few values or many. No information is moved or manipulated just by asking.

Fact 4...

Ad-hoc queries can include numerous output fields. With ad-hoc queries, you browse through a specific set of records.

Smart queries perform complex calculations that would be difficult to achieve using ad-hoc queries, and are based on templates included in *Altru*. Smart queries are predefined queries which you can use in place of many common, but complicated, queries. For example, say we were looking for all constituents who gave last year but unfortunately not this year (LYBUNT). This query would take some time to build and it would be fairly complex. Instead, this is offered as a smart query — the LYBUNT smart query. In *Altru*, you can browse through the list of smart query definitions and see if there's one that suits your needs.

Fact 5...

Do you see your organization trying to manage a ton of queries? If the answer is yes, then you should familiarize yourself with query folders!

You can organize your queries with categories and folders. How so? The first step is to create categories. Use these categories to group your queries. Next, use **Manage query folders** to organize your queries using a folder hierarchy. For example, you can create multiple folders and sub-folders and move existing queries into the folders. Use arrows to conveniently reorganize queries in your folder structure. You can add, edit, and delete query folders at any time based on your organizational needs. Folders are a great tool to help organize your queries and save you time!

Let's Sort through Query Together

The more time you spend in *Query*, the more familiar it will become. The best way to learn is to jump right in and create a query, agreed? To start working with *Query*, click **Information library** from the Analysis page.

Alright, let's get started. First thing to note before we proceed — we use a lot of *Query* terminology in the next sections, but don't let that overwhelm you. You'll become more comfortable with *Query* as you move through this feature. Also remember that you can't destroy your data (Yes, we are serious about Point 3 from above!). We want to group and sort, that's all.

Let's go ahead and create a query together. You have a lot of data to filter through — time to dig in and get our hands dirty!



The first step is to think about what records you want to see. Form a statement, such as “I want to see the names of all constituents who are members and have given a gift this month, listed alphabetically by last name” or “I want to see all the revenue that came in last month, grouped by date.” Be as specific as possible. Go ahead and write down your statement to help you begin building your query.

I Want To See...

As an example, let’s use “I want to see the names of all constituents who are members and have given a gift this month alphabetically by last name.”

Now that we have our statement, let’s dig deeper into the structure of a query.

Queries are all about fields. Remember when you entered a birth date on the Personal tab of a constituent record? That’s the Constituents: Birth date field in a query. There are definitely a lot of fields available in *Query*. But *Query* really is just a list of all the fields on all the different types of records in *Altru*.

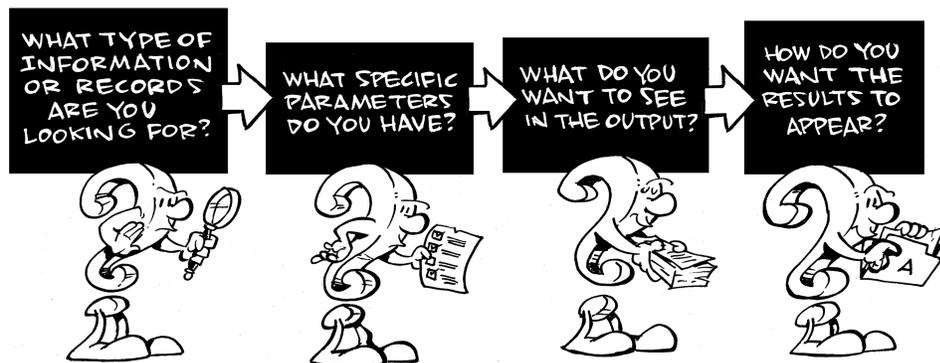
Ultimately, you just need to know where to look in the list. Noodles? Aisle 5 in the grocery store. Date of revenue for constituents? That would be Constituents > Revenue: Date.

At the simplest level, a query answers four basic questions. These correspond to the four main components of a query:

- Source view
- Filters

- Output
- Sort/group options

When you answer these four questions in a query, you should have results that match your statement about the records you want to see.



To begin, we can break down our statement to see which parts match each of the four questions. I want to see... the names of all constituents who are members and have given a gift this month, listed alphabetically by last name.

The names. This tells us we want to see names in the results. This is the query's **Output**.

Of all constituents. This tells us that we need a constituent query, which means we'll use the Constituents **Source View** to create the query.

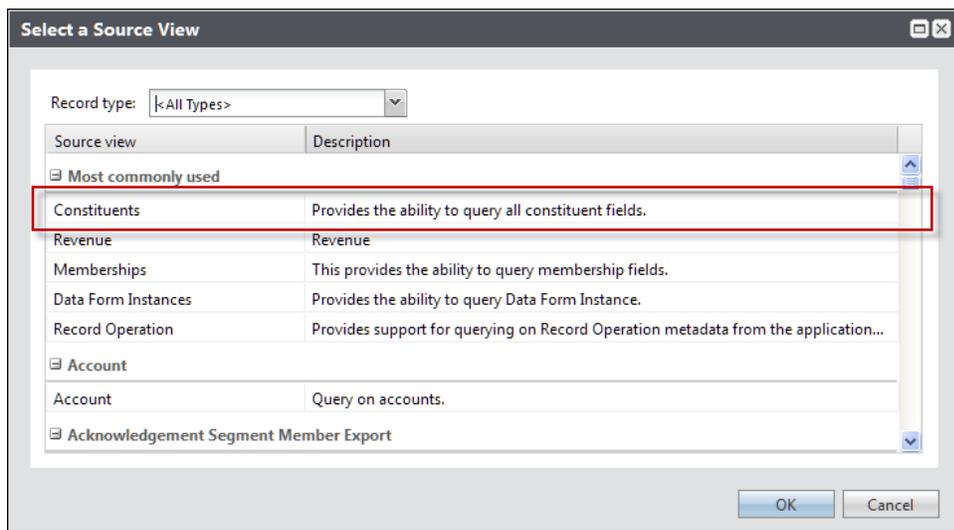
Who are members and have given a gift this month. We want to see members, so we can use the constituency as a **Filter**. If the constituency is equal to member, we match on the first part. So let's look at the rest of it. "... and have given a gift this month" makes things a little more complicated. So we'll need another filter to find the gifts in that time frame.

Listed alphabetically by last name. This tells us how we want to **Sort** the results.

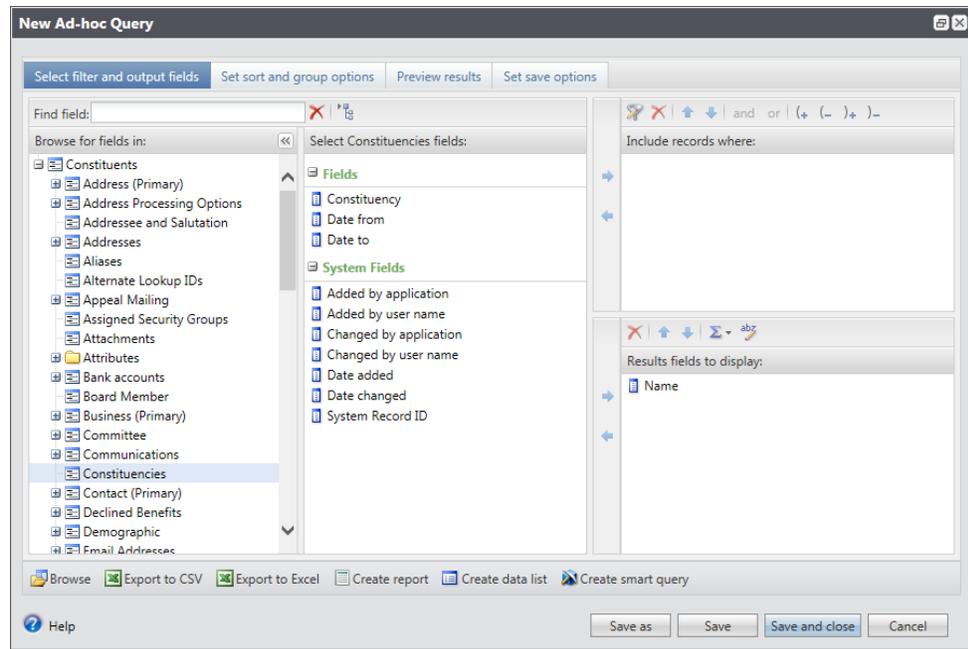
Now let's look at each question individually so we can learn about the parts of the query and how we can build it.



The answer to this question lets us know which source view to pick for the query. Based on our statement “I want to see the names of all constituents who are members and have given a gift this month, listed alphabetically by last name,” we can tell we need to use the Constituents source view.



With the Constituents source view, we'll create a constituent query. But before we begin to build the query, let's review the terminology and basic layout of the query screen. In our case, we'll use the constituent query.



The query screen has four tabs. On the Select filters and output fields tab, you select your parameters. Parameters, criteria, and filters all mean the same thing here... these are the pieces of our statement that help us narrow down the results to see only the specific things we want. In our case, that is the names of all constituents who are members and have given a gift this month, listed alphabetically by last name.

All the fields available in query can be part of your parameters. Field names appear in the center column of the query screen. Under **Browse for fields in**, you see the field hierarchy that groups similar fields together into expandable nodes. For example, all of the fields associated with constituencies are grouped together under the Constituencies node. When you select Constituencies under **Browse for fields in**, these fields appear in the center column. Remember, it's all about fields.

On the query screen, we can also see some filter options and some output options. We'll talk about the filter options next. And we'll get to the other tabs a little later!

WHAT SPECIFIC
PARAMETERS
DO YOU HAVE?
(FILTERS)

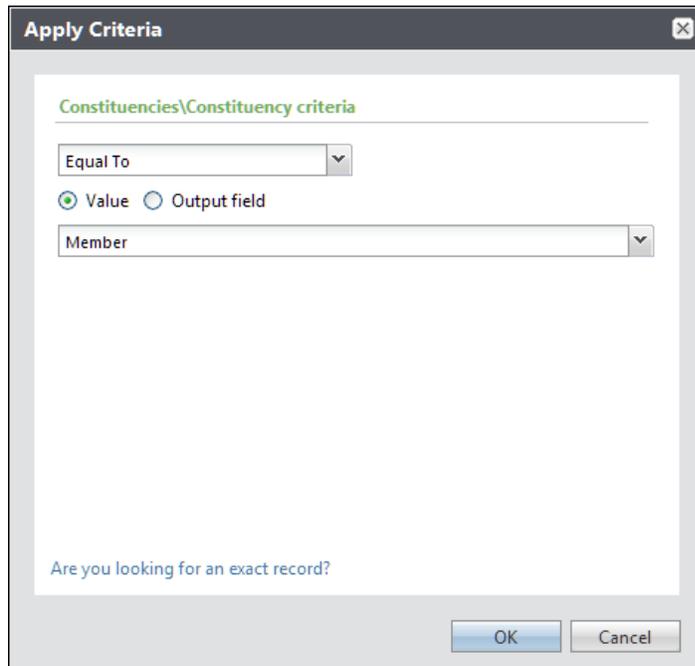


The purpose of this question is to help us determine the filters we'll need for our query. Do we want to see only constituents who are major giving prospects? Or board members? Or volunteers? Do we want to see only revenue given in the last month or year? In our case, we know we want to see members who have given a gift this month.

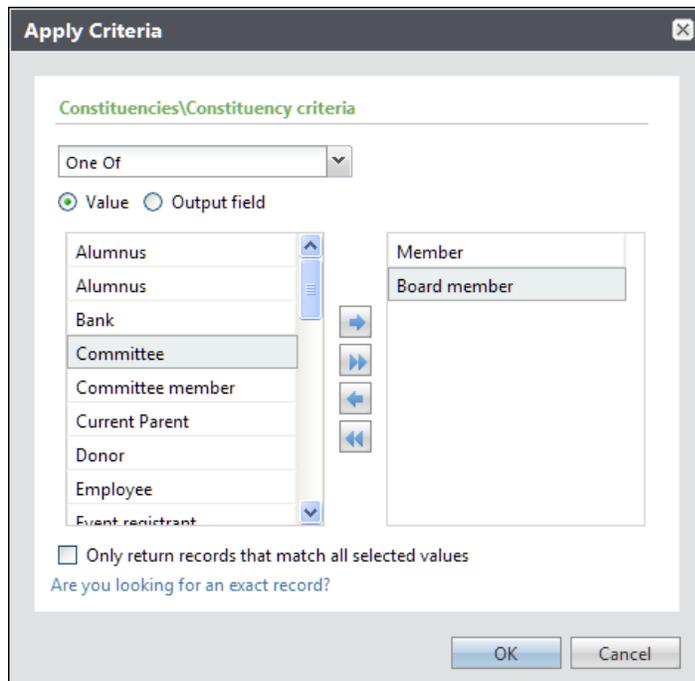
To set the filters, we need to know a little more about the filter options. After we select fields for the filters, we sometimes need to make additional decisions. For example, if we use a date field as a filter, we must decide whether to use today's date, a date range, or some other specific date.

Often, we need more than one filter. The filter options allow us to use different filters together. For our example, we need to use a couple of filters to show members who have given us a gift this month. But to start us off, we need a filter to show constituency equal to member. To find the Constituency field, we need to select Constituencies under **Browse for fields in**. After we select it,

the Constituency field appears in the center column. After we drag the field into the Filters section, we can select the criteria operator and the values we want to use. So we would say: Constituency is Equal To Member, where “Constituency” is the field, “Equal To” is the criteria operator, and “Member” is the value to use.

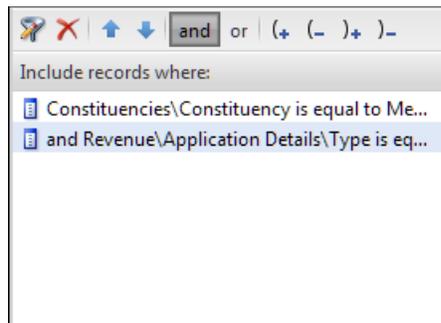


What if we wanted to see all members AND all board members? (Although we hope our board members are engaged enough to be members too!) We could select the criteria operator “One Of” instead of “Equal To,” and then pick both “Member” and “Board member.”

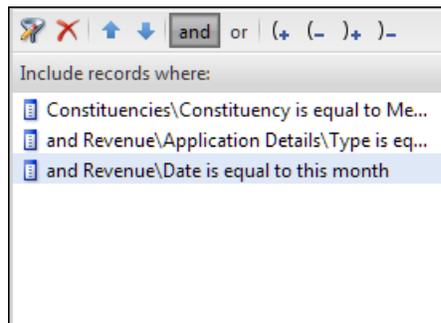


We also could have picked other criteria operators, such as “Not Equal To” or “Blank.” You can experiment with them to get a feel for how each one works (For details about all available criteria operators, check out our latest user guides at www.blackbaud.com or search *Altru's* help file).

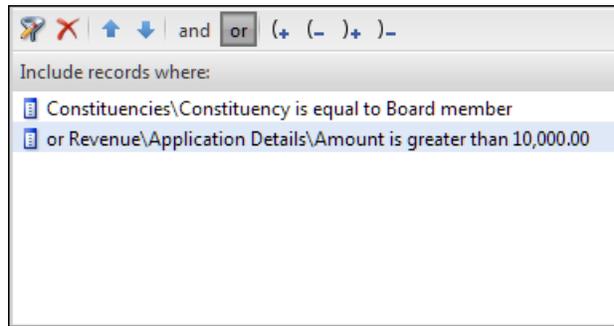
But that's just the first part! We need to get creative with filters and combine them in order to see members who have given a gift this month. Let's take the "given a gift" part of our statement. We're going to have to dig a little deeper in under **Browse for fields in** to find this one. For gifts, we'll need to select Constituents > Revenue > Application Details: Type and set that filter equal to gift.



We still have one more piece: this month. Now that one isn't too difficult. That's just the Constituents > Revenue: Date field. And we'll need to set that equal to this month!



Here are a few other examples of filters. Can you figure out what these filters mean?

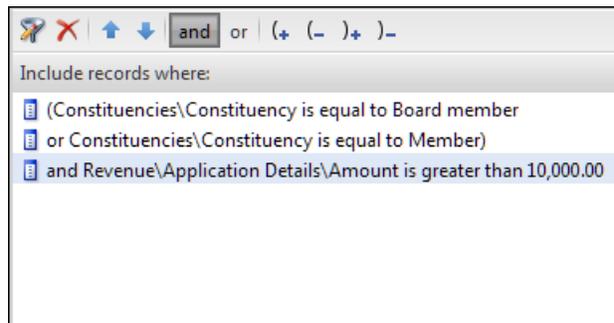


Constituencies\Constituency is equal to Board member. This first part tells us the constituency must equal “Board member.”

Revenue\Application Details\Amount is greater than \$10,000.00. The second part tells us the revenue amount must be greater than \$10,000.

Did you notice the “or” before the second one? That tells us the constituent can meet either criteria and still be included. You might have a board member who has given only \$5,000 and you might have a major donor who has given \$100,000 — both would show up in the results. If we used AND instead of OR to connect the two, only board members who had given more than \$10,000 would be included.

Ready for another challenge? What do you think these filters mean?



This one is definitely even more complex. It uses an OR, an AND, and parentheses. See if you pick the right answer!

- The constituents must be board members, regular members, and have given more than \$1,000.
- The constituents must be board members, regular members, or have given more than \$1,000.
- The constituents must be board members or regular members. And either way, they have to have given more than \$1,000.

If you picked the last one, you're right! The OR between the first two filters tells us the constituent can meet either criteria and still be included — you can be a board member or a regular member. The third one tells us constituents with either constituency must also have given more than \$1,000.

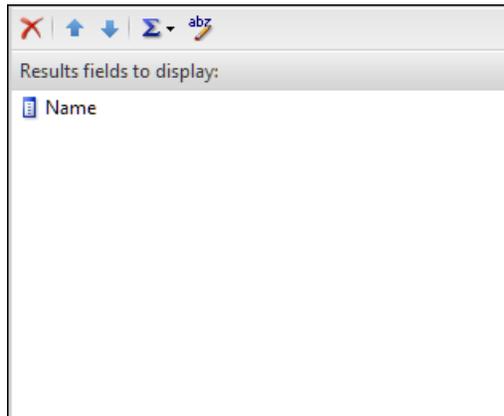
I think we've played enough with the filters for now, so let's keep going.

WHAT DO YOU
WANT TO SEE
IN THE OUTPUT?
(OUTPUT)

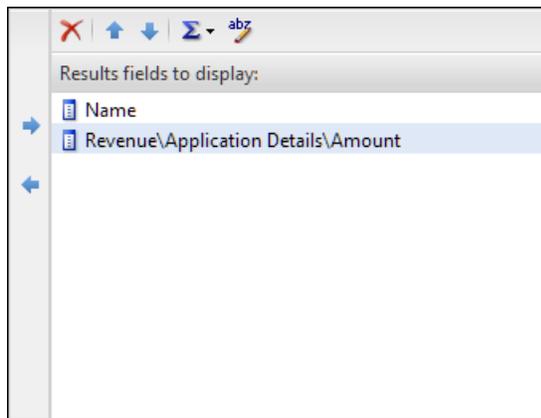


This question provides us with the output fields for our query. For example, if we include phone numbers in the output, do we also want to see if the numbers are marked "Do not call?" The fields we include under **Results fields to display** will help us verify that our results match what we're trying to accomplish. That means we want to include enough fields for us to tell if we're really seeing "the names of all constituents who are members and have given a gift this month, listed alphabetically by last name."

So at a minimum, we know we want name as an output field.



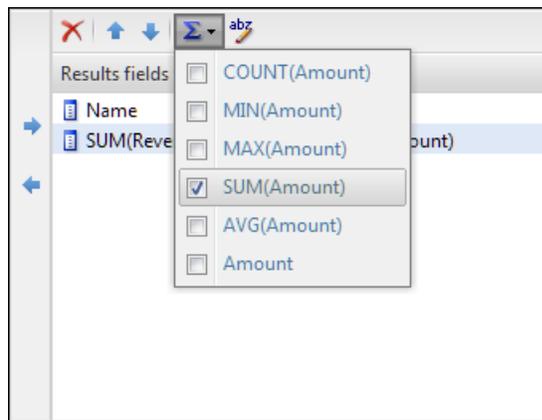
This one is pretty straightforward and, in fact, is the default output field for a constituent query! But what if we wanted to see the amount of the gift too? That means we'll need to add Constituents > Revenue > Application Details: Amount too.



But what happens if we're lucky enough for a member to have given us a couple of gifts this month? That constituent would show up twice in our results — once for each gift. So maybe what we really want to see is the total amount of all the gifts each member has given us this month. For that, we need our good friend, the **Summarize** button.

The **Summarize** button can do different things depending on the summarize function we select and the field we use it with. The results of the **Summarize** button are also impacted by the fields in our output.

For our amount field, we can click the **Summarize** button and use the SUM function to show us a calculation of the field results rather than the actual contents of the field. So what does this really mean? If a member gave us two gifts this month — \$50 and \$100 (hey, it could happen!) — then we could summarize the amount so the results would include the member only one time, with gift amount combined as \$150. Sound interesting? I thought so. So what we need to do is select the amount field in the **Results fields to display** section, click the **Summarize** button, and select "SUM(Amount)".



It's like magic, having the revenue total like that! So let's keep that as part of our statement now. A word of caution: if we summarize the revenue amount for constituents but include a date field in the output, all of a sudden the game changes. Since the gift dates are probably different, the output of the two gifts (including date) is now unique and the revenue won't be summarized. But luckily, we don't need to include date as an output field since we're using the date "this month" in our filters. The **Summarize** button definitely has a lot of power, so don't be afraid to use it!

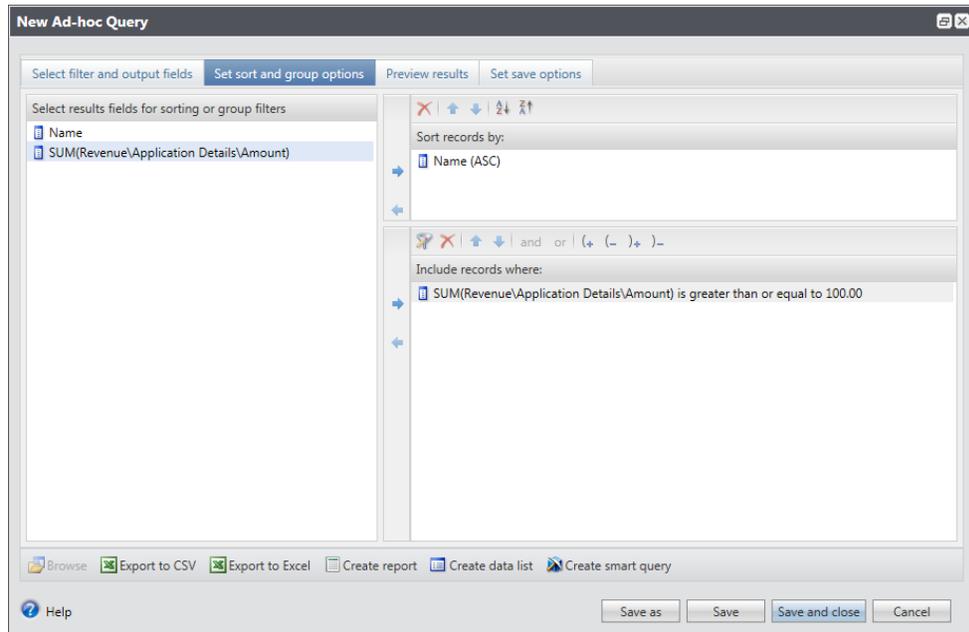
Had enough on output? Let's move on.

HOW DO YOU
WANT THE
RESULTS TO
APPEAR?
(SORT | GROUP)

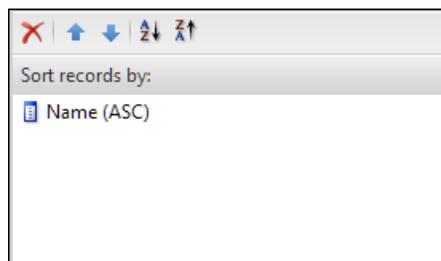


This question provides us with the sort options for our query. Do we want to list constituents in alphabetical order? Do we want to list revenue by amount or by date? Let's look back at our statement: We wanted to see constituents in alphabetical order.

So let's jump over to the Set sort and group options tab and see what we can do.



We can sort our query results only by fields included in our output. If you don't see it in the **Results fields to display** section on the first tab, you won't see it on the Set sort and group options tab. So in the **Select results fields for sorting or group filters** section, we have two choices: Name and SUM(Revenue\Amount). In our statement, we said we wanted to see members, listed alphabetically by last name. Can you figure that out?



That wasn't too bad. We wanted to sort by name in ascending order, which means A to Z. Coincidentally, that's the picture on the little button for the options in the **Sort records by** section!



Keep in Mind...

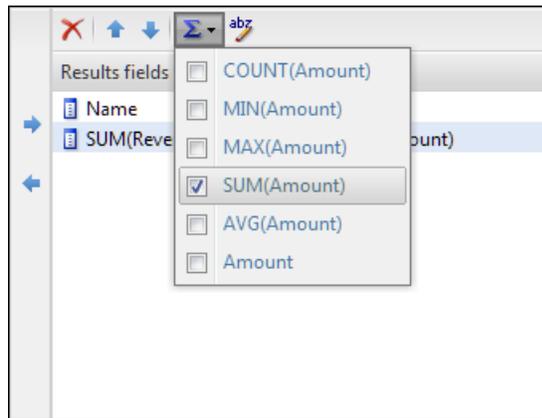
Sometimes, we'll get to the Set sort and group options tab or even the Preview results tab and realize there's something missing, or we have a new idea about how we want to sort our results. So we might have to go back and add more fields to the output. Don't worry—it's not a big deal.

What if, instead of sorting alphabetically by member name, we wanted to sort by the date of the revenue? Guess we'll have to add the Constituents > Revenue: Date field to the output first. After we do that, we can drag the date field into the **Sort records by** section instead of the name field. Now our results would be sorted by date, with the oldest gift (still in this month!) first. But remember, if we include the date field in our output, the SUM(Revenue\Amount) function won't work to give us the totals.

So we need to think carefully about what's more important. Keep in mind that queries are a way to group records. We can save the results of the query to use elsewhere in *Altru* or even export the results to a spreadsheet.

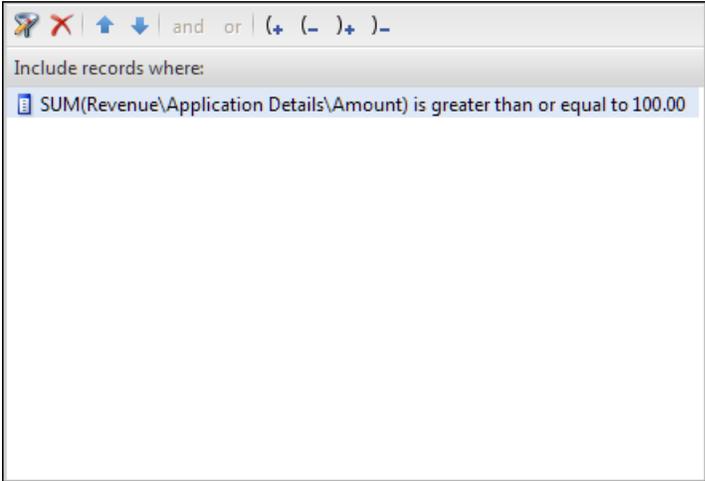
So what about group filters?

With group filters, you can extend the use of a summarized output field. Remember how we used the SUM function a few minutes ago for the output fields on the Select filter and output fields tab of our query? This gave us the total amount each member gave this month, instead of having each gift on a separate line.

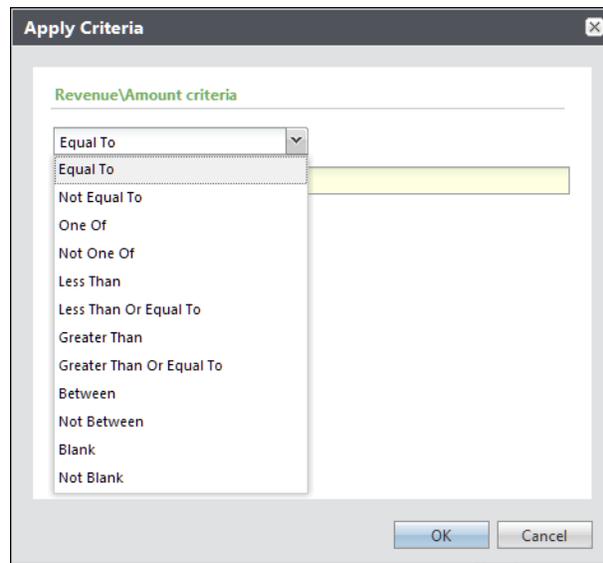


What happens if we wanted to summarize the giving, but then also extend that summarized information as yet another filter in our query? What if we wanted to see only the members who gave \$100 or more this month? Stick with me here!

For that, we'll also need to use the summarized amount field under **Select results fields for sorting or group filters** on the Set sort and group options tab.



Just like with regular filters, when we drag this field to the **Include records where** section, we get some additional options.



So we can then say that we want the total, summarized amount to be Greater Than Or Equal To \$100.

THE RESULTS!



Before we check our results, let's review our original statement (plus the one summarize modification we added, because that was just too cool). We want to see the names of all constituents who are members and have given a gift this month, listed alphabetically by last name. We also want to see the amount of their gifts this month summarized instead of seeing each gift separately. Sound good?

Now we can go to the Preview results tab to check to see if things look okay, but... wait! The names are sorted alphabetically, but by the whole name, not the last name! So we have Audrey Lorenz before Clara Daniels — not exactly what we were expecting.

Remember how we talked about getting to the end and realizing we need to take a step or two back to add other fields to the output or change the sort order to see exactly what we want? Well, that's where we are. No big deal.

Let's jump back to the Select filter and output fields tab and add the last name to the **Results fields to display** section. We're looking for the Constituent: Last/Organization/Group/Household name field. That's a mouthful, but trust me; that'll get us the last name. Now we also need to go to the Set sort and group options tab to change our sort from the whole name to just the last name. Let's make those changes and take another look at the Preview results tab.

Results (107 records found)

Name	SUM(Revenue\Application Details\Amount)
Alberta Bell	\$650.00
American Tour Company	\$5,230.37
April Portillo	\$5,472.00
Arthur Blank	\$520.00
Barb Morrison	\$375.00
Bev Lawson	\$109.00
Black Mesa Research	\$1,440.00
Bob Cinnater	\$130.00
Briana Frank	\$110.00
Cage Barber	\$500.00
Cami Prieto	\$785.00
Carrie Engram	\$420.00
Cassie Lake	\$100.00
Cheryl White	\$200.00
Chris Chavez	\$470.00
Chrissy Farraj	\$500.00
Christopher T. Young	\$33,521.00

Page 1 of 3

Export to CSV Export to Excel Create report Create data list Create smart query

Save as Save Save and close Cancel

This looks great! It's just what we were expecting, which means we built our query correctly! Now we can let our membership director know about each of these loyal and generous members!



Keep in Mind...

If we want to use our query results in a spreadsheet outside of *Altru*, we can export the results. However, if we do this, we get exactly what shows up on the Preview results tab. If we summarized revenue, we'll have only the total and not each individual gift. If we didn't include a date field, then no date.

Well, we made it through the examples (dirty hands and all!). Think about other types of information you'd like to pull from a query. Try to build a few statements on your own and play around with the filters. Just remember to be as specific as possible. Go forth and create!

I Can Do THAT in Query?

We put together a few of the more impressive *Query* tricks that you're sure to love. Mark your favorites so you can check out the functionality once you're working in *Altru*.

- Want to access your query and its results from a mobile device? No problem! Use the **Make this query available in Mobile Query** option.
- If needed, you can export all your query results. Exporting a query enables you to send its results to another software application. You can create an export of the results of any query, then download a comma separate values (.csv) file of those results for use in another program.

- Want to pull *Altru* data directly into other tools, such as *Microsoft Excel* or *Tableau*? You're in luck! Every query in the system provides an OData (Open Data Protocol) link. Once you get connected, you can share pivot tables, dashboards, and charts created with OData with any user, regardless of their Blackbaud permissions. You can even refresh the query's results directly from the other tool.
- Using your mouse, hover over certain areas of your query to view tooltips. These tooltips display complete information that otherwise cannot fit on the screen. For example, when you create a query and specify a filter, you can hover over the filter to see exactly what you chose.
- Use **Find field** to search for any available field related to your query. Can't remember the full name of the field you need? Just type in the part you remember. *Altru* displays applicable fields in the Find results list for you.
- When you preview query results, click on the column heading to sort your results for easier viewing.
- From the results page of a query, you can select a page in the program to view the query result records. For example, if your results are a list of constituents, you can choose to view the records using the constituent page, online information page, or registrant view page.

Work Smarter With Smart Fields

Smart fields are like queries on steroids! Smart fields allow you to quickly find specific information that would normally require several complicated queries and reports to pull together. For example, using smart fields, you can easily view a constituent's average lifetime gift amount and the total amount they've given this year. If you tried to pull these same values through a regular query, they would take a long time to process due to their complexity. What makes smart fields so fast is the fact that they're not calculated at the time you view them. Instead, the values are refreshed during a scheduled business process so the heavy lifting happens after hours.

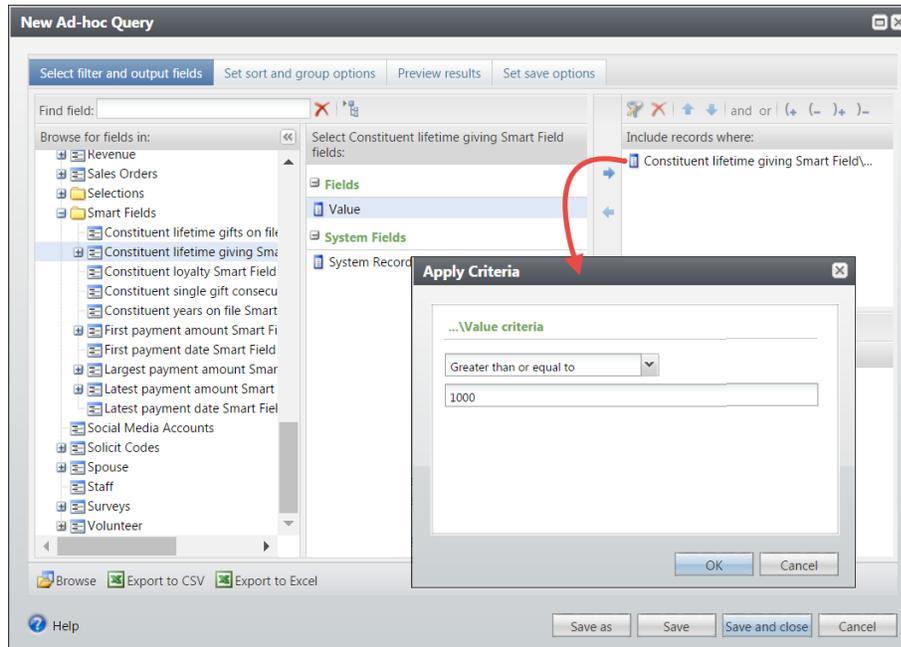
How Can I Use Smart Fields?

While their speedy nature is pretty great by itself, what makes smart fields really powerful is what you can do with them. Here are a few examples:

- Quickly view details about a constituent's giving history on the Smart Fields tab of their record. For example, you can view key fundraising statistics like Last Gift Date, Last Gift Amount, First Gift Date, Largest Gift Amount, etc.
- Calculate a suggested donation amount based on the constituent's prior giving.
- Calculate the number of consecutive years the constituent donated.
- Assign a constituent loyalty category based on gifts given on an annual basis: New, Multi, Lapsed, Reactivated, or Non Donor.
- Build queries and selections based on smart fields.

Building Queries

Here's an example of a basic query you can build. Let's say you have an appeal mailing you want to send to all donors who have given a total of \$1000 or more over their entire giving history. To create a selection of these donors, start with a regular constituent query. In the **Browse for fields in** area, expand the **Smart Fields** node and select the **Constituent lifetime giving** field. Drag the **Value** field into the filters area and set your filter criteria.



When you save the query, make sure to select the option to create a dynamic selection. Use this selection when you're choosing the recipients for your appeal mailing.

Configure Smart Fields

Now that we know why it's smart to use smart fields, let's talk about how to configure them. From the Smart Fields page in *Administration*, users in the Smart Fields system role can add and modify smart fields. They can also grant other users permission to use smart fields in queries and exports and to view them on constituent records. To add a smart field, the smart field administrator chooses a "definition" which is basically the type of smart field you are building. For example, you would use the "Constituent Revenue Application Amount" definition to calculate total or average giving amounts and the "Constituent Revenue Application Counts" definition to calculate the total number of gifts. Several types of constituent, marketing, and membership smart field definitions are provided in *Altru*.

After you choose a definition, some smart fields include additional options on the Parameters tab which determine how the smart field is calculated. For example, several of the constituent revenue smart fields allow you to set a date range and choose the types of revenue to include.

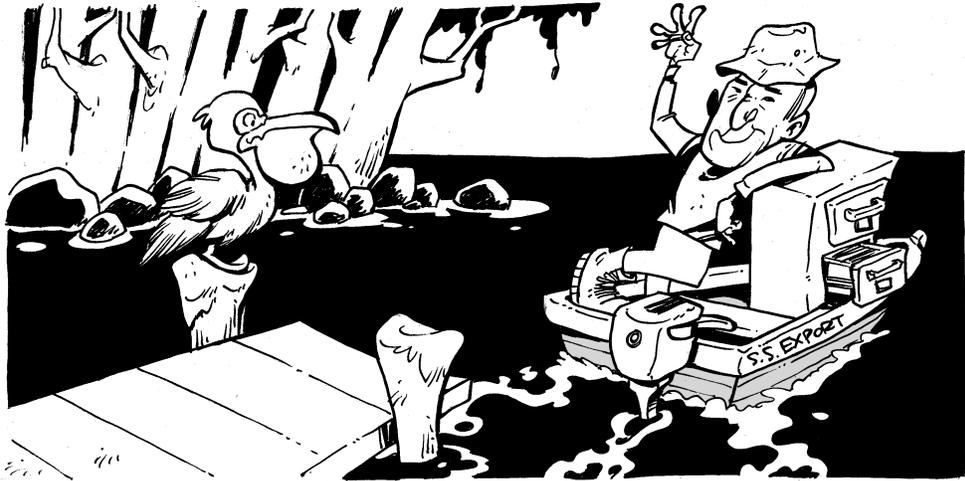
Process Smart Field Values

After you save a smart field, you need to run the process to calculate its values. (Smart fields won't be available on records, queries, or exports until you process them.) From the Smart Fields page, click the field's name to open its process page. From the process page, under **Tasks**, you can click **Start process** to run the process immediately. Depending on your selected parameters, this process can take a while and might bog down performance in other areas of *Altru*. To avoid these issues, we recommend scheduling a process to run automatically at night. From the process page, click **Create job schedule** under **Tasks**. Then select the time and frequency to run the process.

CUSTOMize Your Export

Export is an equally important piece to your data management efforts. So far, you've mastered the concept of "data in" by way of a batch and import files. You've also learned how to group and sort with *Query*.

With *Export*, you can transport data from *Altru* in preparation to send to another application — all without leaving the country (or even your office)!



Feel free to step off the ship for a few minutes while we dig deeper into *Export*.

When you export information, you extract pieces of information from your database and send it to another place (mainly another software application). For example, you may want to create an export file to send to a word processing program for a mailing or to a spreadsheet program for further analysis. You can also use *Export* with other program functions, like mailings or reports or with other software applications, such as Microsoft *Word* and Microsoft *Excel*.

As we mentioned earlier, *Query* is a close friend of *Export*. When you create an export file, you select the query of records to export or specify a selection of records to use in combination with export definitions. When you create an export definition, you must select a “source view” which determines the export fields you can choose from. For example, when you create an export definition for constituent letters, the available fields are based on the constituent query view. After you select an initial source view, you identify the fields to include in the output, the column order, the row sort order, and the sites to associate with it. For all exports, you must specify the format to use for the exported data, and create a name and description to help identify the export process.

If you want, you can run an export process on demand or schedule an export process to run at the time most convenient for your organization, such as overnight. After you run an export process, data is extracted and put into an export file. You can then download the information stored in the export file to a comma-separated value (*.csv) file for processing in a mailing or report.

Speaking of reports, this process works well if you routinely create custom reports using your *Altru* data. With *Export*, you can select appropriate criteria, extract information you want to use, and create a customized report. You can update the data in your export by saving the export record to use as a template for similar exports.

Export Is Closer Than You Think!

Like *Batch* and *Import*, you can access *Export* from *Administration* (click **Export**).

From the *Export* page, you can create export processes to push data out of your system. You can also set export options to specify how the exported information will appear. Just remember, the query or export definition determines the output fields for your export, and the format options tell the output fields how to appear. You can also specify the appearance of things like currency, date, and time.



Data Management Backtrack

Before we move on to how you can analyze all the data you just put into *Altru*, let's review how you manage that data through batch entry, import, query, and export.

Batch Backtrack

Take some time to consider how your organization will use *Batch*.

Which batch types will your organization use most often?

- You can assign different numbering schemes for each batch workflow. In fact, multiple workflows can share a single numbering scheme. How will you define the batch numbering scheme for batch entry in your database? Will you use different numbering schemes for different workflows?
- What states will you add to your batch workflow? What tasks will you add to the batch workflow state? Think about user groups for each workflow. Who will have access to enter data, validate, and commit?
- What fields will you use in your Constituent batch templates? Revenue batch templates? What other batch templates will you use in your organization?

Import Backtrack

Before you bring any information into your database using *Import*, give it careful consideration.

- What types of information do you store in applications outside of *Altru*? Are you prepared to import that data?
- When you add an import process, you can create a unique name and enter a description for the import. What type of naming convention will you use to ensure consistency?
- Will you use the automatic mapping feature within *Altru* to map import fields to the system fields? Some fields may not automatically map so be prepared to manually map the ones that don't.

Query Backtrack

You want to group and sort existing information in your database with *Query*. Before you start, give it some thought.

- What kind of information do you want to sort on a regular basis?
- How will you name your queries?

- How will you use the operators to combine criteria and get the query results you want?
- What calculations that are available with the **Summarize** button would you want to display in your query results?

Smart Fields Backtrack

Smart fields allow you to quickly view complex calculated values on records, queries, and exports. Before you set these up, here are some decisions to work through:

- How do you plan to use smart fields?
- Which definitions and parameters will you need?
- When and how often will you want to refresh smart field values?

Export Backtrack

Before you extract information from your database with *Export*, think about when and how you'll do this.

- What program will you use to further analyze data that you export from your database?
- Will you create a job schedule for your export process? If so, what schedule type will you use?

For detailed information about the features discussed in this chapter, including how to perform related tasks, see the *Batch and Import Guide* and *Query and Export Guide* available at <https://www.blackbaud.com/howto/altru.aspx>.

CHAPTER 13

Reports and KPIs

"Philanthropy is the mystical mingling of a joyous giver, an artful asker, and a grateful recipient."

– Douglas M. Lawson

In This Chapter...

- ▶ *Reports: Take a Day Trip and Don't Forget the Camera!*
- ▶ *KPIs: Take the Scenic Route. All Aboard!*
- ▶ *Reports and KPIs Backtrack*

Which Hat Do You Wear?



chapter.

The content in this chapter applies most directly to those who analyze data in *Altru*. Use reports to take a snapshot of your data to review with your peers or executive board. Use KPI instances to measure performance or track your organization's progress toward a goal. Since different roles at your organization may include the use of both reports and KPIs, we suggest you read this entire

You've been busy reviewing the features in *Altru* and how they work together to ensure your organization's success. From constituents and revenue to sales and events, you worked hard to learn about key areas that will help your organization run efficiently. Along the way, you learned data management strategies and suggested workflows to maintain consistency with your data entry. Now, we'll review ways you can analyze that data!

Let's take a tour of your data using two analysis tools — Reports and KPIs. We'll discover the differences in each as well as the best time to use them. Not sure how we'll get there? Here's a hint... you'll fly high above as you take a sweeping tour of your data with reports. Next, you'll enjoy a scenic ride through your data using KPI instances.



So get ready — it's time for a mini-vacation (at least for the duration of this chapter!).

Reports: Take a Day Trip and Don't Forget the Camera!

How do you capture snapshots of special events and people in your life? Perhaps a digital camera or the built-in camera in your mobile device? The days of the Polaroid seem like ages ago (aren't you grateful we live in a digital era?). Yes, technology has evolved, but the idea of the camera has not. We still use it to capture moments in time.

In *Altru*, you use reports to capture snapshots of data. A report is a tool you can use to quickly gauge information in your database at a specific moment in time. For example, you may want to check the status of the appeal mailing you sent last month. You can use the Appeal mailing performance report to view details. Or perhaps you want to view this week's pledge and recurring gift activity. You can use the Revenue activity report to see what's come in so far!

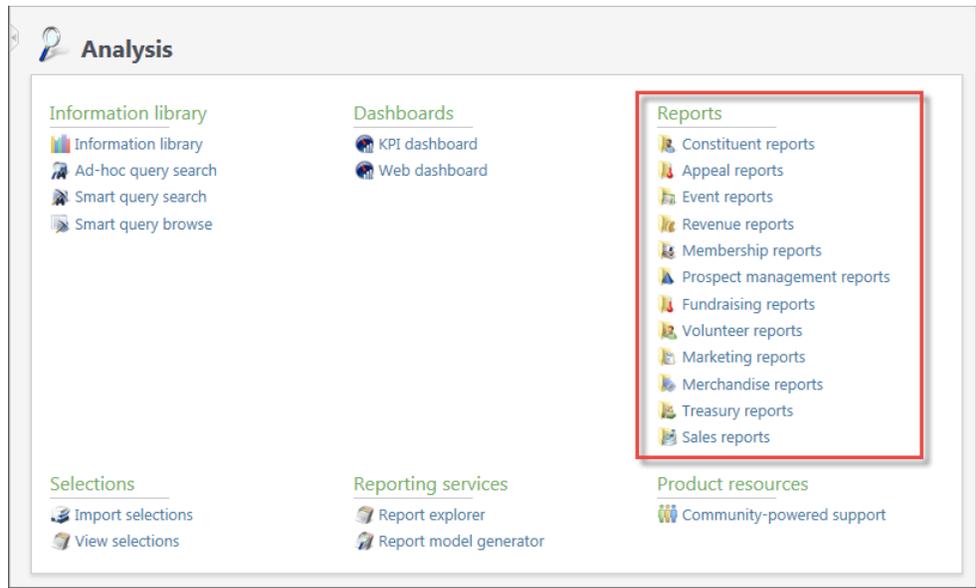
For each report, filters are available to help narrow the amount and type of data you want to display. Examples of filters are name, date, status, program, sales method, campaign... the list goes on! Keep in mind that even though many types of report filters exist in *Altru*, all filters are not available on every report.

After you select values for your filters and view a report, you can print your results to show your executive board or others in your organization. You can also export report results for use in Microsoft *Excel* or Microsoft *Word*.

Later, you'll take an exciting tour through some of your reports, but for now, let's review how you can access reports and who will most likely use them.

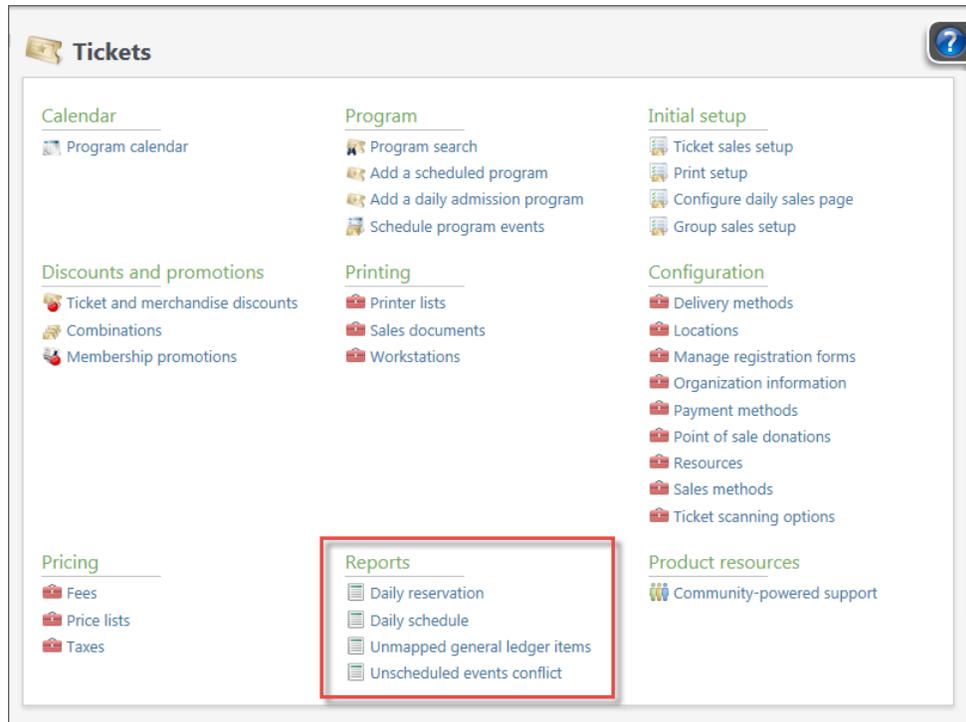
Access Reports and Plan Your Route

In *Altru*, you can access reports two ways. First, from *Analysis*, you can view a list of report categories.



After you click a specific report category, a more detailed page appears with links to each available report. For example, when you click **Treasury reports**, a page appears that lists links for the Deposit report and Miscellaneous payment report.

Second, you can find links to reports from within the specific area of *Altru* that you're working in.



Keep in Mind...

Even though *Altru* provides multiple ways to access a report, you're still taken to the same report. For example, you can access the Constituent profile report from the Constituent reports page in *Analysis*, or directly from *Constituents*. Enjoy the flexibility of being able to access reports from different places!

For example, from *Tickets*, there is a **Reports** section. Under **Reports**, you can view links to the following reports:

- Daily reservation report
- Daily schedule report
- Unmapped general ledger items report
- Unscheduled events conflict report

Who Can View Reports? You May Need a VIP Pass!

Not all reports are available to every user. Depending on your system role and security rights, you'll be able to view reports that are relevant to your job responsibilities. Here are examples of how some reports may suit a specific job:

- A guest services manager would be interested in a merchandise sales report.
- A board member would find a variety of membership reports useful.
- An accounting manager would need to work with the deposit report.
- A director of development would likely use benchmarking and revenue reports.

Altru contains many different reports to fit almost any need. Most areas in *Altru* provide one or more reports that give you a snapshot of your data.

Now that you know the purpose of *Altru* reports and how you can access them, let's begin our trip through the database!

Take a Tour of Your Reports

Whether you catch a television commercial for a new vacation spot, hear friends conversing about their summer beach plans, or thumb through a magazine advertising fabulous cruise deals, we all light up at the notion of a getaway.

While this section doesn't offer coupons for spring break extravaganzas, it does offer the next best thing — a quick tour of your *Altru* data using reports.

Today, the agenda includes a helicopter tour of your data using three different reports... and you're the pilot! Don't worry, we'll help direct you where to go. (We may even take a few snapshots for posterity!) Think back to the Data Management chapter where you felt empowered to take control of your data and manage it well. Use that same energy and excitement to pilot through your reports. Ready? Let's go!

You'll take off from beautiful Las Vegas for an amazing aerial escape! Your points of interest include:

Giving Detail Report. Soar across Lake Mead while you view information about constituent giving during a time period you define.

Daily Admission Report. Relish in the view of the mighty Hoover Dam as you enjoy a graphical view of daily admissions sold for a specified date or period of time.

Sales Report. Relax with a picnic lunch on the ground as you absorb the sights of the spectacular Grand Canyon. View all sales revenue your organization has received and see the percentage of income each revenue category generates.

It's time to hop in the pilot seat and buckle up!



Keep in Mind...

Altru provides a large number of reports to fit a variety of needs. For more information about every available report, you can view our latest user guides or search *Altru's* help file.

Giving Detail Report: Lake Mead, What a View!

A report you may frequently use to view revenue statistics is the Giving Detail report. To access this report, from *Analysis*, click **Revenue reports, Giving detail report**.

With this report, you can view information about constituent giving during a time period you define. The report includes totals of revenue received within the date range for each designation, as well as constituent name and address information. Of course the data included in the report depends on the filters you select. When you're ready to see results, click **View Report**.



Hold Up!

To filter your report further, you can use the **Designation, Appeal, and Campaign** fields. Be careful not to narrow your criteria too much or the report will not return any results.

Next on your tour is the Daily Admissions report.

Daily Admission Report: The Mighty Hoover Dam

For those with an interest in admissions for your organization, the Daily Admission report will be useful. To access this report, from *Analysis*, click **Sales reports, Daily admission report**.

With the Daily Admissions report, enjoy a graphical view of the daily admissions sold for a specified date or period of time. It also provides a view of daily admissions sold by price type. The price type data includes the specific number of admissions sold per price type and the overall percentage of admissions sold for each type. When you're ready to see results, click **View Report**.

Just ahead... the Sales report.

Sales Report: To Your Right Is the Magnificent Grand Canyon

If your job responsibilities include analyzing sales data, the Sales report will be a key tool for you. To access this report from *Analysis*, click **Sales reports, Sales report**.

With the Sales report, you can view all sales revenue your organization has received and see the percentage of income each revenue category generates. You can use the date parameters provided to generate a year-to-date report of sales revenue. When you're ready to see results, click **View Report**.

A Smooth Landing

Great job (you're a natural!). You successfully caught a glimpse into several reports. Remember, there are many more reports in the system that can help you analyze your data.

Here are a few tips that will help you navigate your reports:

- On a report with multiple pages, click **Previous page** or **Next page** to move between pages.
- To refresh the data and view a report, click **Refresh**.
- To search the report for a word or phrase, enter text in the search field and click **Find** or **Next**.
- You can export the results in several file formats, including Excel and PDF.

KPIs: Take the Scenic Route. All Aboard!

When you travel, do you prefer to fly or drive? Perhaps you enjoy the great outdoors and love to hike or bike to your destination. In many cases, the length and nature of the trip are the deciding factors in your choice of transportation. The overall goal is to get from point A to B, but you need the best mode of transportation, or tool, to get you there. And, of course, you want to enjoy the view along the way!

Let's shift gears for a moment and take a look at one of *Altru's* tools that will ultimately help your organization move from point A to B. This tool is called a KPI and it stands for Key Performance Indicator. It's a tool you can use to analyze your data, which will then give you insight into your organization's progress toward a goal.

For example, your organization may decide to track the total number of gifts generated each month as a performance indicator. Or, if your organization uses direct marketing, you may decide to track the cost per dollar raised for a specific mailing. With KPIs, you can create an instance that defines this indicator. After you create the instance, your organization can view the status of your KPI goals and schedule updates for KPI instances.

KPIs can also track your organization's strategic performance to help you determine a course of action. When you monitor your business activity with KPIs, you can place a value on otherwise difficult to measure activities, such as leadership development.



Hold Up!

You may have access to view the progress and results of a KPI instance. Or, you may have access to create KPI instances and view results. Your system role and security rights determine how much you can work with KPIs.

Now that you understand the overall purpose of a KPI, it's time to use KPIs to take a scenic tour through your data. The KPI train leaves in approximately 5 minutes... and your the conductor! Grab your conductor's hat and meet us at the train station. Check out the itinerary below for all your instructions!

Build Your KPI Itinerary

As a train conductor, you help plan the train's schedule and route. You determine the destination and ensure your passengers are comfortable along the way. When passengers board the train, you check to make sure each person has a ticket and you verify all passengers are on the correct train. After all, we wouldn't want to derail Mr. and Mrs. Bee-Byrd's anniversary trip to California by mistakenly sending them to New York! Your ultimate goal is to arrive at your destination on time while everyone on board has a pleasant traveling experience!

In *Altru*, KPIs can help your organization have a smooth ride as you travel toward your goal. For the purposes of this trip, let's say you're the event manager (conductor) of the KPI train. As an event manager, you have access to create new KPI instances and view the results.

Review the itinerary below to learn more about KPIs and how you can use them. Prepare yourself for the beautiful landscape that surrounds your data and KPI workflow:

- Get to know your passengers. Who will be your KPI authors, administrators, and consumers?
- Plan your route. Familiarize yourself with the location of your KPI instances.
- All aboard! For this trip, you're leaving Chicago's Union Station and heading to San Francisco. Along the way, you'll create the Event Registrant Capacity and Event Revenue KPI instances. So start collecting tickets from your passengers and ensure they are comfortable. This KPI train is leaving the station!
- Take in views of the majestic Rocky Mountains and breathtaking Sierra Nevadas while you monitor your event's statistics. Both KPI instances will help you determine your course of action to ensure a successful event.
- San Francisco, we're here! Reach your final destination and celebrate your organization's success.

KPI Users: Get to Know Your Passengers

Before you board the train, let's greet the passengers. It's important to understand how people work with KPIs in different ways.

KPI Author

The KPI author is the person that creates KPIs. Several KPIs are provided in *Altru* out of the box. If you need additional KPIs, contact your in-house developer or your implementation consultant to help with this customization effort.



Keep in Mind...

KPI instances can be created based on specific definitions. The definitions help determine the behavior of the KPI. There are three definitions: Standard, context-sensitive, and dynamic goal. We won't go any further with these definitions in this chapter. When you're ready to work with KPIs, be sure to review the latest user guides at <https://www.blackbaud.com/howto/altru.aspx> or search *Altru's* help file.

KPI Administrator

The administrator creates KPI instances based on a user's request. For example, the major giving manager wants his fundraisers to monitor their performances based on the dollar amount of each fundraiser's qualified gift opportunities. The manager makes this request to the KPI administrator who uses the "Opportunities Amount" KPI spec to create KPI instances for each fundraiser.

Now, this isn't the case for every user. Remember, the level of KPI access is different depending on your system role and security rights. Since you're an event manager, you have rights to create KPI instances and view results.

KPI Data Consumer

The consumer is the individual interested in viewing the data generated by the KPI. As an event manager, you have an interest in viewing this data so you're considered a consumer. Other staff members and volunteers that help with events in your organization can be consumers as well.

Access KPIs and Plan Your Route

In *Altru*, you can access KPI instances from *Analysis*. To access the KPIs page where you can create and manage KPI instances and update their values, click **KPIs**.

After a KPI instance is created, you can access the KPI instance from a record. If the KPI instance you create is based on a context-sensitive KPI definition, KPI links appear on records related to the KPI instance. This gives you another way to access and manage the KPI itself.

You can also access up-to-date KPI statistics without opening *Altru* — just copy the RSS feed link into your Internet browser and add it to your **Feeds** list.

KPIs: Let the Journey Begin!

Just as your passengers are excited about boarding the train and beginning their journey, your organization is thrilled about its upcoming event! To monitor the preparation and progress of your event planning, you'll need to create your two event KPI instances.

Here's the setup: Your organization is preparing to host its Annual Spring Auction. In the past, this event has raised large amounts of revenue for your organization and this year, you expect the number of attendees to double!

As an event manager, you want to closely monitor the number of donors registering to attend the event. You're also interested in the amount of revenue that is generated leading up to the event in the form of registrations and donations.

To accomplish this, you want to create two event KPI instances. You can then monitor statistics leading up to the day of the auction.

First, you need to create an Event Registrant Capacity KPI instance. With this particular instance, you can track registrants for your upcoming event by comparing the number of registrants to the event's capacity. When you create a KPI instance, you can select parameter details on the Parameters tab to narrow the type of information you want to monitor. For this KPI, select the Annual Spring Auction as the event. You can also select other parameters, such as a date, goal values, and goal milestones.

Next, create an Event Revenue KPI instance. You want to view the amount of revenue coming in for the event. Select the Annual Spring Auction as your event and select other parameters, such as revenue type, a date, goal values, and goal milestones.



Keep in Mind...

You must complete all required fields on the Parameters tab before you can proceed to the next tab.

Save your KPI instances and generate values for them. When you generate values manually, values associated with the KPI instance parameters are updated, giving you the most up-to-date data. You can also set your KPI instances to update at set intervals (using a business process).

Okay, your KPI train is well on its journey. Get ready to take in the beautiful countryside as you monitor the progress of both KPI instances throughout the duration of your event preparation.

Check Your Progress While You Enjoy the View!

This trip offers spectacular views of the Rocky Mountains and Sierra Nevadas. After all, the view is the best part, and the reason why you chose to travel by train. You want to be on the ground, taking time to enjoy the sites.

In your role as an event manager, your effort is by no means a quick trip (that's why you'd use reports!). Use your KPI instances to monitor the progress of your auction preparation. Using the two KPI instances you just created, you have the ability to gauge the registration numbers as well as the revenue generated thus far. Keep in mind that you may need to change your course of action to ensure registrations and revenue increase to your target goal.

Remember, you can monitor KPI statistics from within *Altru* or by using an RSS feed.

You're doing great! Keep an eye on your statistics... you're on the right track to a successful auction!

Your Final Destination

We're pulling into the train station in San Francisco! You and your passengers are happy and comfortable. You not only arrived safely, but you did so while enjoying the beautiful landscape along the way.

Your auction was a success! You monitored its progress and, along the way, you made a couple of key changes to increase your numbers. Congratulations — your organization was at maximum capacity for the auction and you raised twice as much as last year!



Reports and KPIs Backtrack

Before we move on to how to configure web forms for online sales and event registrations, let's review how you use reports and KPIs to analyze your data.

- Use reports to capture snapshots of data. Remember, a report is a tool you can use to quickly gauge information in your database at a specific moment in time. For each report, specific filters are available to help narrow the amount and type of data you want to display.
- KPI stands for Key Performance Indicator. KPIs help you analyze your data, which will then give you insight into your organization's progress toward a goal.

- You may have access to view the progress and results of a KPI instance. Or, you may have access to create KPI instances and view results. Your system role and security rights determine how much you can work with KPIs.

For detailed information about the features discussed in this chapter, including how to perform related tasks, see the *Reports and KPIs Guide* available at <https://www.blackbaud.com/howto/altru.aspx>.

CHAPTER 14

Web Forms

*"Any sufficiently advanced technology is indistinguishable
from magic."*

— Arthur C. Clarke

In This Chapter...

- ▶ *Getting Started: Configuration and Setup*
- ▶ *Page Designer: One Design to Rule Them All*
- ▶ *Design Web Forms: Weave Your Own Web*
- ▶ *Web Forms Backtrack*

Which Hat Do You Wear?



The content in this chapter applies most directly to Web Forms Administrators. You'll learn about all aspects of web forms, from designing the appearance of web pages and configuring a shopping cart, to designing acknowledgement messages.

Picture this — you're on the couch watching a movie while you pay bills on your tablet. Or you're at the doctor's office and you make a dinner reservation on your phone while you wait. Does this sound familiar? Of course it does! We can do almost everything online these days and your patrons expect to be able to plan their visit, make a donation, or buy a membership from your website when and where it's convenient for them.

You probably already have a web site that provides information about your organization and the types of programming and services you provide. Using features in the *Web* area of *Altru*, you can multiply the power of your website by making it interactive and self-servicing for patrons. Web forms allow users to purchase tickets, make donations, register for events, and buy memberships. After a user checks out, they immediately receive a confirmation email that says thanks and includes additional information, such as details about the event and links to their eTickets. All of this is automated which helps your staff save time and effort.

Web forms are hosted on Blackbaud's servers so they are managed separately from your website. People who wear a Web Forms Administrator hat handle all aspects of web forms, from designing the appearance of web pages and configuring a shopping cart, to customizing individual web forms. Once your forms are configured and "live" in *Altru*, you'll use links to integrate them with your main website and to promote them through email and social media marketing.

Web forms are connected to your *Altru* database so all information collected during an online transaction flows seamlessly to the patron's constituent record and other areas of the program for tracking and reporting. This information helps your staff make informed decisions about future events and programming, and how to engage your constituents' needs and interests.

Getting Started: Configuration and Setup

Most of your time in *Web* will be spent on configuration. Some initial tasks are “one and done” while others may need tweaking from time to time. For example, once you set up the default acknowledgement email and turn on user registration, you probably won’t need to touch those again. However, you will likely need to update the styling of your forms periodically to stay consistent with your main website. The good news is once your web forms are set up, they are mostly hands-off and you can spend your time and attention on other aspects of supporting your mission.

Setting up your web forms has three stages:

- Configure general settings
- Design the look and feel of web pages
- Configure form-specific settings for web forms.

The following sections provide the ins-and-outs of each configuration stage, starting with the general settings found under **Configuration**. Some of these tasks are nice-to-haves, while others are required to make your forms work. As you might imagine, you can’t sell tickets or accept donations until you configure the shopping cart.

Default Acknowledgement Email: Don’t Forget to Say Thanks!

Acknowledgement emails are sent after website users complete an online transaction, such as making a donation or registering for an event. While we recommend that you create custom acknowledgement emails based on the type of transaction, you’ll need a default acknowledgement email to use when a web form does not have a custom message. Because the default acknowledgement email could be sent from any type of web form, it’s best to keep the content generic with a simple “thank you.”

Email Alerts: Stay on Top of Things

You can set up email alerts that are sent to your staff members when users complete transactions on web forms. Using **Email alerts for online sales**, you can assign alerts for ticket sales, event registrations, membership sales, and donations to individual users. For example, you can use alerts to monitor how quickly events are filling up so you know when to adjust capacity or resources. You can also use alerts as prompts to follow up with registrants when their event has special requirements or the venue changes. After you set up email alerts in *Web*, you can use the Email alerts management page to view email alert settings and remove alerts for email addresses.

CAN-SPAM: Email Preferences and Privacy Policies

Altru automatically creates a page where website users can opt out of marketing emails and a privacy policy page that explains information collection and disclosure. To comply with CAN-SPAM regulations, you must include links to these pages in all email messages that are not related to transactions, such as appeals and membership renewal reminders. When a website user chooses to opt-out, the program selects the **Do not send email to this address** option on the constituent record for the email address used to register for the website.



Hold Up!

The privacy policy page includes a standard website privacy policy. We strongly recommend that you review this policy with your organization's legal counsel or IT department to make any necessary updates.

eTickets: Print at Home or Scan the Phone

When website users purchase tickets using program or event registration forms, they have the option to print their tickets. After checkout, the user receives a simple email with a link to the eTickets page, in addition to the acknowledgement email created for that form. The printer-friendly eTickets page includes the ticket number and a scannable barcode, as well as event information including the event name, date, time, and location. Ticket holders can bring a printed copy of this page or pull up the page on their mobile device for you to scan at admission.

The eTickets page is customizable — you can edit the default text and add additional text above or below the ticket information. Because this page appears for all events with eTickets enabled, we recommend that you keep the information generic so it's appropriate for all types of events. For example, you can include your organization's contact information, refund policy, or driving directions. If you want to provide event-specific information, you can include it in the acknowledgement email created for that particular form.



Keep in Mind...

To allow website users to print tickets, in *Tickets*, you must enable eTickets as a delivery method for the Online Sales sales method.

URL and Browser Settings: Get Users to the Right Page

A feature all websites have that you've probably never paid much attention to is the label that appears in the title bar or tab of a browser window. You'll need to enter the label you want to appear for all pages generated from *Web*. Most organizations enter their name and location or a very brief description.

Web forms typically have a limited lifespan and eventually expire. For example, the program automatically removes donation forms whose designations become inactive or out of date. Using the **Home page URL** field, you can choose where to redirect users when they attempt to access a web form that is no longer available. We recommend that you enter the URL of your website's home page.

User Registration: Fill in the Blanks

"I love to enter my contact info into forms," said no one ever. One of the best things you can do to create a repeat visitor or donor is to make it easy for users to quickly complete transactions on your web forms. When you enable registration, a website user can access a special page where they can create login credentials for your web forms and provide contact information. The program uses email addresses as user names, and users create their own passwords.

Online registration provides many benefits to your organization and website users:

- When registered users log in, name and contact information from their constituent records automatically fill in fields on web forms. (They're going to love this!)
- When members log in, the program automatically applies any member discounts they qualify for. Logging in also verifies which members are eligible to purchase tickets for pre-sale or members only events.
- When a registered user completes a payment or event registration through a web form, the transaction appears on the user's constituent record. For example, on the Sales Orders tab, you can view which of the constituent's transactions were made online and can drill in for more information.
- When constituents register through web forms, the Online Info tab appears on their records. On this tab, you can view information about the constituent's online activity, such as the pages they've visited.

After you enable user registration, the **Sign in/Register** button appears at the top of all web forms. Users are also prompted in the shopping cart to register. Use the URL generated for the registration form in emails or social media that promote your website. It's also good idea to turn on the confirmation email that's sent to the user automatically when they register.



Keep in Mind...

When you configure the user registration form, you can choose whether to require users to enter first names, titles, or phone numbers. To ensure that you receive complete information for the constituent record, we recommend that you make the first name and phone number fields required.

Web Payment Settings: AKA "The Shopping Cart"

Before you create web forms to accept donations, or sell tickets or memberships, you must configure a shopping cart to process payment transactions.

From the Web payment settings screen, you can select which merchant account to process credit card payments with. You can also design a confirmation screen, select required fields for the form, and enter how long to maintain items in shopping carts for website users that do not check out immediately.

The confirmation screen is the page that appears after a user completes a transaction from any web form. You'll want to keep this content fairly generic since the same confirmation screen appears for ticket purchases and donations. In most cases, you can repurpose the content from your default acknowledgement email. Make sure to include a reminder to ticket buyers to download their eTickets.



Did You Know?

When a website user makes a payment on a web form without logging in, the program checks your database to see if the user is already a constituent. If the program finds a record with the same name and address, it associates the transaction with that constituent. If not, the program creates a new constituent record for the website user. To learn more about constituent matching, read the *Constituent Duplicates and Merge Tasks Guide*.

Page Designer: One Design to Rule Them All

After you get the general settings configured, you're ready for the nitty-gritty of designing your pages. The Page Designer is a tool that helps you create attractive and organized web pages that have the same look and feel as your main website. Settings configured in the Page Designer apply to all pages that display web forms, as well as all special pages such as the email preferences, user registration, and privacy policy pages. To access the Page Designer, go to *Web* and click **Page designer** under **Configuration**. Use the **Next** button in the Page Designer to move between the Select Layout, Colors & Styles, and Configure Content tabs.

Select Layout

On the Select Layout tab, select a page layout in the column on the left and then preview it on the right. The layout determines where items such as the header and footer appear on your web pages.

Select Layout Colors & Styles Configure Content

Select Layout

Header and footer with a border, Responsive

Header and footer, Responsive

Preview

Things & Stuff Museum

Home About Help

Donation Information

Amount: One-time Recurring

Designation:

Shipping Information

Title:

First Name:

Last Name:

Country:

Things & Stuff Museum
123 Main Street
Somerville, MA 02145
603-555-1234

Site Map Contact Us Help
Home and Museum About Us Feedback

©2011 Things & Stuff Museum

Next

Each layout is “responsive” which means it automatically adjusts the page's size and format to accommodate all screen sizes, including mobile devices. The layout shifts the form's fields and options neatly into a row to fit the narrow width of a mobile device and the fonts are enlarged to make text easier to read. These features are increasingly important these days — patrons expect to be able to easily complete transactions from their mobile devices.

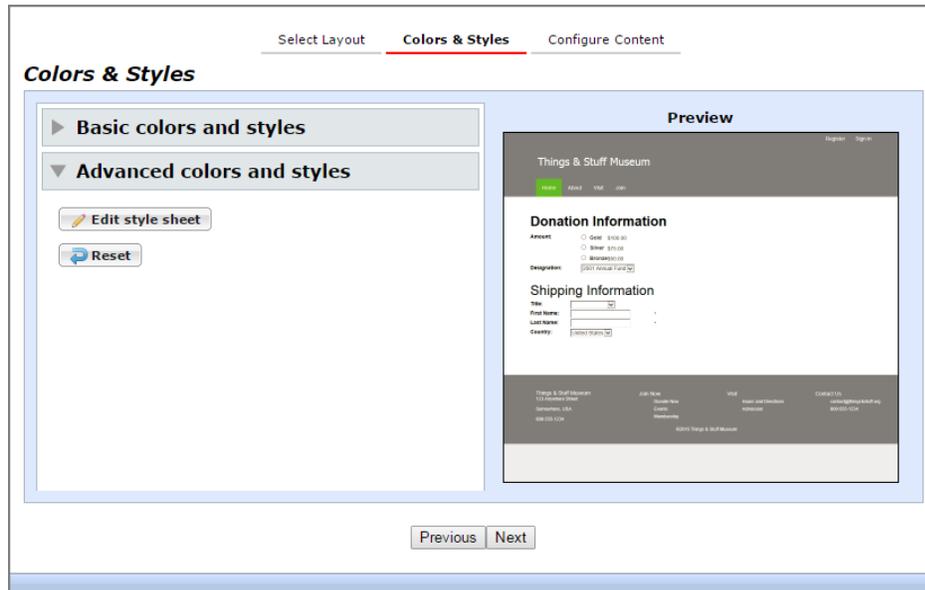


Keep in Mind...

If your organization implemented *Altru* before November 2015, the Page Designer will also include non-responsive layouts. If you're still using a non-responsive layout, we recommend that you adopt a responsive one because you're missing out on great benefits and features. Please see the *Web Forms* user guide for important information about making this switch.

Colors & Styles

You can use a layout just as it comes “out of the box.” Or, using the Color & Styles tab, you can make simple tweaks to the colors and fonts. These updates require only a basic understanding of HTML and Cascading Style Sheets (CSS). As you make changes to the **Basic colors and styles** options, the preview on the right displays the new look.



To make web forms blend seamlessly with your website, you'll need to customize the stylesheet which requires in-depth knowledge of HTML and CSS. Under **Advanced colors and styles**, you can use the stylesheet editor to fine-tune your design. For example, you can customize the size and spacing of specific elements. You can also make style changes that apply to only specific types of web forms. If you don't have a website guru on staff, contact your account manager to get design assistance from Blackbaud's team.



Hold Up!

When you edit the stylesheet using the text editor, the changes go "live" immediately after you click **Save** or **Apply**. We recommend that you check your web forms each time you save or apply changes to verify their effects.

Also, if you click **Reset**, all changes made to the **Basic color and styles** section or style sheet are erased and restored to the default settings. We recommend that you keep a copy of your customized CSS code in a separate text file for backup.

Configure Content

On the Configure Content tab, you can edit the content in the header, footer, and side columns of web forms. For example, you can add text and images, such as your logo and contact information, as well as links to other pages on the website. It's important to make your pages easy to navigate so users can quickly find the information they need to make their transactions.

The screenshot displays the 'Configure Content' tab of a web form editor. At the top, there are three tabs: 'Select Layout', 'Colors & Styles', and 'Configure Content', with the latter being the active tab. Below the tabs, the title 'Configure Content' is shown. The main area contains a preview of a web form. The preview has a dark grey header with the text 'Things & Stuff Museum' and a navigation menu with 'Home', 'About', 'Visit', and 'Join'. Below the header, there is a section titled 'Donation Information' with three radio button options: 'Gold \$100.00', 'Silver \$75.00', and 'Bronze \$50.00'. Underneath is a 'Designation' dropdown menu currently set to '2001 Annual Fund'. Below that is a section titled 'Shipping Information' with a 'Title' dropdown menu. At the bottom of the preview are 'Previous' and 'Submit' buttons.

While the form content in the center of the page appears to be editable, it isn't. It's there to give you an idea of what forms will look like once they are live on your website. To edit the basic content of a web form, such as which fields to include or to update the text, you'll need to use the configuration options found on the individual form. Don't worry, we'll explain this more in the next section.

Design Web Forms: Weave Your Own Web

After you configure the layout for your pages, you'll need to configure form-specific settings for each type of web form. For example, you can set minimum gift amounts for donation forms and how long to keep tickets in shopping carts for program forms. Web forms are ready for the web "out of the box" using default settings, but you'll want to customize some options to create a better experience for your website users. For example, you'll probably want to update the labels on some fields so their tone and terminology is consistent with the rest of your website.

To configure web forms, go to *Web* and click the task for the type of form you want to create or edit. For example, to create a donation form, click **Manage donation forms**. Then you'll access a page with a list of active source items, such as designations or memberships. These source items provide the information used to create web forms.

The screenshot shows the 'Manage Donation Forms' interface. At the top, there's a title 'Manage Donation Forms' and a sub-header 'Designations (16)'. Below this, there are columns for 'Public name', 'Live on website', and 'Has active acknowledgement email'. The 'Endowment' item is highlighted in blue, and its details are expanded in a red-bordered box. The details include: Public name: Endowment, Start date: (blank), End date: (blank), Active: Yes, Approved for website: Yes, Live on website: Yes, Included designations: Endowment, and URL: altrudemo.hostingtest.com/altrudemo/Endowment.

Public name	Live on website	Has active acknowledgement email			
Total Contributions	✓	✓			
Restricted					
Operating					
Endowment	✓	✓			
Copy Edit Exclude from website Options Acknowledgement email					
Public name:	Endowment	Start date:	End date:		
Active:	Yes	Approved for website:	Yes	Live on website:	Yes
Included designations:	Endowment				
URL:	altrudemo.hostingtest.com/altrudemo/Endowment				
Capital Initiative					
Seeding Fund	✓				
Other	✓				

Each list (except combinations) has a hierarchy of top-level items followed by their “children.” These hierarchies work differently for each type of form. For example, each membership program is followed by its membership levels. Options configured for the top-level item apply to all of its children by default, but you can customize the lower levels, too. For example, you may want to create a custom acknowledgement email for each membership level that includes details about the perks and benefits provided by that level.

When you expand a source item in the list, you can view details about the form and access buttons for configuration tasks. While each type of form is configured a little differently, they all include most of these options:

Approve forms for the website. You must enable each form you want to make available on the website. Select an active designation, program, membership, or event in the grid and click **Approve for website**. *Altru* generates the web form and a green checkmark appears under **Live on website** to let you know the web form is ready to use. The program automatically removes any forms that become inactive or out of date, but if you need to pull an active form from the website at any point, you can click **Exclude from website**.

Access and Edit Records. To change details on the source item the form is based on (such as the designation or event), you can click the record’s name to open it. For some types of forms, you can also click the **Edit** button to make quick changes, such as an event’s capacity or web form description.

Copy URLs. The web form’s URL appears in the details. You can click this link to test the form before you make it live. Use the **Copy** button to copy the web form’s URL and details. This is helpful when you add promotional information to your main website or marketing emails and need to make sure you’ve got the details exactly right.

Acknowledgement emails. The default acknowledgement email is sent for all transactions unless you create a custom message for a form and enable it. We recommend that you create custom messages that provide useful information and make the patron feel appreciated. If a patron purchases multiple items that each have a custom acknowledgement email, they will receive multiple emails after they check out.

Options. Each type of form also has specific options you can configure. On the Design tab, you can choose how you want forms to behave. On the Language tab, you can update the default text that appears on forms. These options are addressed in the next sections.



Keep in Mind...

To configure some aspects of web forms, you'll need rights to access the source items the web forms are based on. For example, to edit the designation description for a web form, you must also have rights to the fundraising hierarchy.

Donation Forms: Giving Made Easy

Research shows that online giving continues to grow faster than all other types of giving. Donating online is easy and convenient for donors and your staff. Once your donation forms are set up in *Web*, thousands of gifts can be handled electronically with almost no burden on your staff. When you enable recurring giving (which you really should do for at least one form!), you create a reliable stream of income with low overhead costs.

The Manage Donation Forms page displays all active designations configured in your fundraising hierarchy in *Fundraising*. If you create a form for a total or initiative, donors can choose which project, program, or fund they want the donation directed to.

When you configure options for a donation form, you can edit the minimum gift amount, enable recurring gifts, and define your suggested giving levels. Options for donation forms apply only to that designation and do not affect the lower levels.

Giving Levels. Giving levels prompt online donors with suggested amounts, which often leads them to give more than they originally intended. We recommend when choosing your giving level, start with amounts that are slightly higher than past averages. If you select **Allow other amount**, donors can enter a different amount than those suggested.

Recurring Gifts. When you enable recurring gifts, you get to define which giving schedules to make available on the form. These allow the website user to choose the amount and frequency of their recurring gift payments — weekly, monthly, quarterly, or annually. Online recurring gifts must be paid with a credit card and the first installment is processed immediately when the order is completed. Future recurring gift installments are processed automatically during the nightly recurring gifts credit card process. It's important to note that recurring giving is only available when you're using responsive web forms.



Did You Know?

Every little bit helps! Using **Additional donation options** under **Configuration**, you can add a field to the shopping cart that prompts users to add a donation before they check out. For example, you can ask ticket buyers to chip in a little extra to help fund a special project or research effort.

Program Forms: Skip the Lines

When you sell tickets online, you give patrons the benefit of time — time to explore all programming options, consider ticket combinations, find the best event times and locations, and apply online discount codes — all without the pressure of a line of people waiting behind them. They can even print their tickets at home so there is no need to go through the ticket sales line at all!

Program forms allow website users to purchase tickets for daily admission programs and scheduled program events that do not require registration. The Manage Program Forms page displays all programs and events configured in *Tickets* — daily admission programs appear first in the list, followed by scheduled programs and their individual events. To sell tickets for pre-registered or fundraising events, use the Manage Event Registration Forms page discussed later in this chapter.

Using **Online settings for tickets**, you can choose options that apply to all approved scheduled program and event forms. On the Design and Language tabs, you can select:

- A thumbnail for tickets in the shopping cart.
- How far in advance to sell tickets.
- How many tickets website users can buy per transaction.
- How long tickets remain in shopping carts.
- When to indicate tickets are nearly sold out and whether to display sold out events.
- Enter an email address for website users to contact.
- Allow users to filter the programs and events that appear on forms.

You have additional options for members only and pre-sale events. (These must be selected on the individual forms.) You can include a sign-in button and a purchase button that directs users to the page where they can purchase the required membership. Members must sign in to your website to verify their eligibility to purchase restricted tickets.



Did You Know?

When you approve a program web form, it displays the next available program event approved for online sales. When a program has multiple events scheduled on different days or different times on the same day, the form displays links for **Other dates** and/or **Other times** to help users find their best option.

Combination Forms: Bundles are Better

Selling combinations online provides added convenience and value which leads to more ticket sales! Patrons can quickly purchase a bundle of programs and events through one web page rather than clicking through multiple forms to purchase individual tickets. Plus, they'll usually get a discounted price for buying a combination! *#winning*

Unlike other types of web forms, online combinations are configured from combination records in *Tickets*. From *Web*, click **Manage combination forms**. This takes you directly to the Combinations page in *Tickets*.

From the list, click the name of the combination you want to sell online. On the Web forms tab of the combination record, you can configure descriptions for the combination and its related programs and events. You can also create a custom acknowledgement email and select whether to allow event conflicts.

To enable the combination web form, select the Availability tab. Click **Edit** on the action bar and then select **Online sales** on the Edit availability screen. The **Online sales** option may be disabled if the combination does not meet these requirements:

- Selected events occur on the same day.
- The program group includes only one program.
- The combo has no membership or constituency restrictions.

Other factors may impact a combination's availability for online sales. We recommend reading the *Tickets Guide* for more details.

Membership Forms: Join the Family

Your website is a key factor in providing tangible value and benefits to members. This is important because a happy member is one that's more likely to renew or upgrade and continue to invest in your organization — they might even become a donor or board member one day! Using membership forms, users can purchase new memberships, and existing members can renew or upgrade. They can also purchase memberships as gifts for others.

The Manage Membership Forms page displays a list of your organization's active membership programs and levels. When you approve a membership program for the web, all of its levels are automatically approved too. Web forms for membership programs display all levels the user can choose from. If you want to exclude some membership levels from online sales, you can disable levels individually. When you configure membership form options, you can select which fields and add-ons to include on the form (if the membership allows add-ons).

Altru also generates a membership renewal form to allow existing members to renew online. When you send membership renewal notices by email, you should include a link to this renewal form so users don't try to renew using a regular membership form. If they do use a membership form, they may end up purchasing an additional membership rather than a renewal. You can make the renewal form available on your website even if you don't sell new memberships online.

Event Registration Forms: RSVP Online

Event registration forms allow patrons to register for fundraising events, such as your annual gala ball, or pre-registered program events, such as art classes, lectures, and summer camps. When patrons are able to register online in advance, your staff has more time and resources to organize an event that will really delight your attendees. *Altru* provides real time reporting about who your registrants are, how many people will attend, and if there are preferences or special requirements you need to fulfill. You can use this information to send advance communications, print name tags, and update seating assignments.

Event registration forms are pretty similar to program forms, but have additional fields for registrant information. In case you need a reminder, fundraising events are configured in the *Events* area while pre-registered events are configured in *Tickets*.

The Manage Event Registration Forms page displays all active fundraising events followed by pre-registered programs and their individual events. You can approve or disable multiple events at one time — simply mark the checkboxes next to the events or programs and then click the **Approve/Exclude selected events from/for website** link at the top of the list.

For event registration forms, options are configured for each event and cannot be set on the program. When you configure an event registration form, you can select:

- A thumbnail for registrations in the shopping cart.
- Which price types to display.
- The number of attendees a website user can register per transaction.

- How long registrations remain in shopping carts.
- When to indicate that an event is nearly sold out.

You can also select which fields to include on the form and which are required to complete the transaction. For pre-registered events with membership restrictions, you can add a sign-in button for members to verify eligibility and a purchase membership button to direct users to the page where they can buy the required membership.



Did You Know?

An Auto-fill option appears in the shopping cart so patrons can auto-fill information from a registrant in their cart to another registration in the same order. This is helpful when registering the same person across multiple events, such as a parent registering a child for multiple sessions of summer camp.



Web Forms Backtrack

Before we move on to a refresher on the terminology used in *Altru* and what to do now that you're no longer a "beginner," let's review the basics about web forms.

- In *Web*, you can create web forms that allow patrons to purchase tickets, make donations, register for events, and buy memberships from your website. Web forms are hosted on Blackbaud servers and managed separately from your main web site. Use links to integrate web forms with your main website and to promote them through email and social media.
- Use the tasks found under **Configuration** to configure general settings that apply to all web forms. You can configure a shopping cart to process payment transactions, create a default acknowledgement email, choose your redirect page, enable user registration, update your privacy policy, and enable alerts.

- Use the Page Designer to configure the page layout, colors and fonts, and content that appears on all pages that display web forms, as well as all special pages such as the email preferences, user registration, and privacy policy pages.
- To make web forms blend seamlessly with your website, you'll need to customize the stylesheet which requires in-depth knowledge of HTML and CSS.
- You must enable each form you want to make available on the website. Select an active designation, program, membership, or event in the grid and click **Approve for website**.
- Each type of form has default settings so they are ready for the web right out of the box. You can update the default settings and you can also configure custom options for individual forms.
- Donation forms allow you to accept online donations to the designations configured in the fundraising hierarchy. Giving levels prompt online donors with suggested amounts. When you enable recurring gifts, online donors can choose the amount and frequency of their recurring gift payments.
- Program forms allow website users to purchase tickets for daily admission programs and scheduled program events that do not require registration.
- Using a combination form, an online user can quickly purchase a bundle of programs and events through one web page rather than clicking through multiple forms to purchase individual tickets.
- Using membership forms, users can purchase new memberships, and existing members can renew or upgrade. They can also purchase memberships as gifts for others.
- Event registration forms allow patrons to register for fundraising events, such as your annual gala ball, and pre-registered program events, such as art classes, lectures, and summer camps.

For detailed information about the features discussed in this chapter, including how to perform related tasks, see the *Web Forms Guide* available at <https://www.blackbaud.com/howto/altru.aspx>.

CHAPTER 15

Outroduction

"To succeed, jump as quickly at opportunities as you do at conclusions."

– Benjamin Franklin

In This Chapter...

- ▶ *Altru Lingo: A Glossary*
- ▶ *Altru for No-Longer-Beginners*

So now we come to the conclusion of *Altru for Beginners!* We've covered a lot of ground over the course of this book. Before we pull the curtains to a close, let's take a brief intermission to recap with the backtrack to end all backtracks as we revisit some of the terminology you'll need to understand as you work in *Altru*. And, after all that retrospection, we'll look to... *The Future!* (said with the best Christopher Lloyd/Doc Brown impression imaginable).

Altru Lingo: A Glossary

When you first begin to work in *Altru*, it may sometimes feel like you're learning a new language. If some of the terminology in *Altru* still sounds like Greek to you, consider this your Greek-to-English translation guide. In alphabetical order, here are some terms to remember.

Acknowledgement. A communication sent to a constituent as thanks for a revenue transaction.

Add-ons. Benefits a member can purchase or receive regardless of their level.

Advance sales. A page in which you can process sales. It is recommended that you process phone sales with this page.

Alias. A name by which you can refer to a constituent other than the first and last names. For example, a maiden name or stage name for an individual or an acronym for an organization.

Appeal. A solicitation; how you connect to constituents to ask for donations.

Appeal mailing. A communication sent through the mail or email in support of an appeal.

Application. How the revenue associated with a payment is used, such as toward a donation, pledge, or membership renewal.

Approve reconciliation. A process by which a guest services manager reviews all reconciled sales and approves submitted reconciliations.

Ask ladder. A tool used to determine the appropriate donation amount to suggest in an appeal mailing based on the giving history of the recipient.

- Bank.** When you add a bank to your *Altru* database, Altru adds the “Bank” constituency to the specific organization record that you choose as your bank. A constituency specifies the relationship an organization has with your organization.
- Bank account.** Includes information, such as an accurate account name, account number, routing number, account type, GL cash account number, and balance information.
- Batch.** A spreadsheet you can use to add or update many records at once. Examples include constituent, revenue, and timesheet batches.
- Batch numbering scheme.** Determines how *Altru* will automatically generate numbers to identify a batch. The generated numbers can contain a sequence number, the date, and a user-defined label.
- Batch template.** Defines basic information about the batch, such as fields included in the batch and default values for the fields.
- Batch workflow.** Determines the states a batch must complete before its records can commit to the database (commit means to apply or save the records to your database). Once you create a workflow, you can create a batch template.
- Benefit.** An incentive provided to constituents to encourage giving or membership activity.
- Category.** A way to organize items such as events or merchandise within a department. For example, for merchandise, a department of Media may include categories of CDs and DVDs.
- Channel.** The method used to communicate with a constituent, such as mail or email.
- Cloud services.** How Blackbaud delivers *Altru* to you over a web browser rather than an installation on your computer or network.
- Combinations.** Bundles of two or more program events that are sold together as a single item at a discounted price.
- Commit.** When you commit a batch, the data you enter in the batch is used to create or update records in your database.

Committee. A constituency of groups that solicit funds or coordinate events for your organization.

Constituency. Defines the affiliation a constituent has with your organization, such as Patron, Donor, or Staff.

Constituent. A supporter of your organization; anyone and everyone who helps your organization support its mission.

Daily sales. A page in which you can process sales. It is recommended that you process in person sales with this page.

Delivery method. A way by which a patron can choose to receive their purchased items through Advance sales. The delivery methods include, in person, will call, and mail.

Department. A way to organize merchandise. A department is required before you can begin to add merchandise.

Deposit. Payments must be linked to a deposit in order for you to post them. If you know you'll be working with a large amount of payments, consider creating multiple deposits. Add deposits in *Altru* that represent the actual batches of cash and checks that you bring to your bank.

Designation. The purpose or intended use of revenue received through a donation or other charitable giving.

Dimension. A characteristic of merchandise that allows you to create multiple inventory items on a single merchandise record. For example, if you have a whale T-shirt with dimensions of size and color, you can create the different combinations of size and color on the whale T-shirt record.

Direct debit. Electronic funds transfer (EFT) payments made with bank account information, such as for checking and savings accounts.

Donor. A constituent that donates to your organization.

EFT. "Electronic funds transfer." *See:* Direct debit.

eTicket. When website users purchase tickets using program or event registration forms, they have the option to print their tickets at home. The printer-friendly eTickets page includes the ticket number and a scannable barcode.

Explorer bar. The column on the left of your screen, where you can access tasks, reports, and information about the page you're currently on.

Export. Transport data from *Altru* in preparation to send to another application. For example, you may want to create an export file to send to a word processing program for a mailing or to a spreadsheet program for further analysis.

Export definition. The list of fields required to personalize a communication; when you generate output for a communication, these fields display information specific to the recipient.

Fund designation. A lower-tier designation in a fundraising hierarchy, funneling into Initiative designations; identifies funds raised toward a specific goal or tribute such as a Scholarship Fund or Memorial Fund.

Fundraising hierarchy. The tiers of designations used to support a fundraising purpose.

Gift-in-kind. A donation of a good or service. Not to be confused with a service performed for free as a volunteer, a constituent provides a gift-in-kind as a donation with a recognized cost or monetary value.

Group. Multiple individual constituents who act together to support your organization but do not live together. For example, a giving circle.

Home page. The first page that appears when you log in. To reduce the need to navigate through *Altru*, you can personalize this page with the tasks you perform most often.

Household. Multiple individual constituents who live together at one address.

Import. When you import, or bring information into your database, you create new records or update existing records using a batch template.

- Individual.** A “people” or “human” constituent. Individuals in your database may be related to other constituents, such as spouses and business contacts, and not have a direct relationship with your organization.
- Initiative designation.** The middle tier designations in a fundraising hierarchy, funneling into a Total designation; indicates the intent of revenue received such as Operating Costs or Endowment.
- Installment schedule.** The frequency and number of installments in which to break down a commitment such as a pledge or recurring gift.
- Inventory item.** The actual item or items on the merchandise record. For example, if you have a merchandise record of whale T-shirt, the whale T-shirt is the inventory item.
- Itinerary.** For a group sales reservation, these are the scheduled daily programs and events a group will attend.
- Key performance indicator (KPI).** A tool you can use to analyze your data, which will then give you insight into your organization’s progress toward a goal.
- Letter.** The written content to include in a communication.
- Link payment.** When you link a payment to a deposit, you associate a payment with that deposit. Because payments are a part of the deposit record, all depositable payments must be linked to a deposit before they can be posted for use with your external general ledger.
- Matching gift.** A donation from an organization given in response to, and at a percentage of, a donation given by an employee or other related individual.
- Matching gift claim.** A commitment generated based on another donation’s eligibility in an organization’s matching gift program.
- Member.** A constituent who participates in a membership program at your organization. Or, an individual constituent included in a group or household.
- Menu bar.** The row of menus at the top of your screen, where you can access various tasks and features.

- Merchandise.** Items usually sold at a gift shop are considered merchandise. This includes items such as clothing, pens & pencils, & souvenirs. This does not include items such as tickets, memberships, & event registrations.
- Name format.** An addressee or salutation; how you refer to a constituent in a communication.
- Navigation bar.** The row of features below the menu bar, where you can access features or navigate forward and backward through the pages in your history.
- Number pad.** In Daily sales, the number pad is used to enter quantity and dollar amounts.
- Online sales.** With web forms, patrons can purchase tickets and memberships, and make donations using the shopping cart on your website. Sales orders from online transactions are managed in *Sales*.
- Organization.** A “business” constituent such as a corporate partner, an organization that donates to your cause, a vendor, and a business related to an individual such as a bank or employer.
- Order summary.** An area on the Advance sales and Daily sales page that displays items that have been added to the order.
- Package.** The content to include in a communication such as a membership renewal notice or event invitation.
- Page designer.** A tool used to design the layout and appearance of all web pages that include web forms, as well as all special pages such as the email preferences, user registration, and privacy policy pages.
- Patron.** A constituent that has paid for a sales order.
- Pay on arrival.** A patron can decide to pay for their items upon picking up the tickets at the front desk or will call.
- Payment.** Money or revenue received from a constituent toward a donation or commitment such as a pledge, event registration, or membership dues.

Payment method. How a constituent makes a payment to your organization, such as cash, check, credit card, or gift-in-kind.

PCI DSS (Payment Card Industry Data Security Standards). Requirements established by credit card companies such as Visa and MasterCard for the security of sensitive credit card and cardholder information.

Pledge. A commitment to donate a specific amount to your organization at some point in the future.

Prenotification. A verification sent to a financial institution to ensure bank account information is correctly set up for a direct debit transaction.

Price type. Price types are the different rates for tickets. For example, you can set different prices for adults, seniors, and children.

Price list. A group of price types. You can load a price list to programs to quickly establish standard prices and then adjust specific prices as needed.

Program designation. A lower-tier designation in a fundraising hierarchy, funneling into Initiative designations; identifies funds raised toward an ongoing expense such as research efforts or a series of instructional classes.

Project designation. A lower-tier designation in a fundraising hierarchy, funneling into Initiative designations; identifies funds raised toward a one-time expense such as the construction of a new building.

Query. Helps you filter and group records. You use filters and other criteria to ask a question, and a query displays results in the form of records that match your criteria.

Quick cash buttons. In Daily sales, the quick cash buttons are used as a way to accept cash payments.

Receipt. A communication sent to a constituent as record of a donation, such as for tax purposes.

Recognition program. A program where you reward constituents based on their level of annual giving.

Reconcile sales. A process by which a ticket seller counts their drawer for accurate dollar amounts and credit card receipts. It is then submitted for the guest services manager to review.

Recurring gift. A commitment to donate a specific amount at regular intervals (typically monthly).

Registration type. A price option for a special event, such as Single or Family.

Relationship map. A visualization tool that displays a constituent's relationships in a spoke-and-wheel diagram, with the constituent as the hub that the relationships revolve around.

Reminder. A communication sent to a constituent as notification when an installment toward a pledge or recurring gift is due.

Report. A tool you can use to quickly gauge information in your database at a specific moment in time.

Revenue. Payments and commitments of future payments such as pledges, matching gift claims, and membership dues. In addition to monetary transactions, revenue can include contributions of stock, property, and services as gifts-in-kind.

Sales deposit. A process that takes all approved reconciliations and creates a deposit slip.

Screening plan. A list of steps volunteers must complete before you can assign them to a job.

Smart fields. Smart fields allow you to quickly find specific information that would normally require several complicated queries and reports to pull together. For example, using smart fields, you can easily view a constituent's average lifetime gift amount and the total amount they've given this year. You can use smart fields to build queries and selections, among other things.

Solicit code. A request received from a constituent about how you communicate appeals, such as "Do not mail" or "Call after 6:00."

Special event. An event held outside of a ticket program such as a fundraising gala, training for staff and volunteers, or marketing outreach; an event managed from *Events*. Not to be confused with a program event managed from *Tickets*.

Status bar. The row on the bottom of the page that displays information about your connection to the database.

System role. The collection of rights assigned to users to determine the tasks required to perform their jobs.

Total designation. The top-level designation in a fundraising hierarchy; indicates the overall objective of the designations in the hierarchy.

Trait. The skill set of a volunteer; used to match a volunteer to an applicable job.

Transmission file. An electronic file containing payment information and sent to a financial institution or credit card processor to process transactions.

Treasury. The area of the *Altru* where you set up banks and bank accounts, create deposits, and post.

Tribute. A donation that a constituent makes “in honor of” or “in memory of” another constituent.

Upgrade path. The membership level hierarchy defined for a membership program, starting with the most basic level at the top.

Vendor. An organization that supplies merchandise. A vendor is required before you can begin to add merchandise.

Volunteer. An individual who donates unpaid time to your organization.

Web forms. Web pages your organization can create to allow website visitors to donate, purchase tickets, register for events, or join membership programs.

Workstation. A computer configured to run a cash drawer or to print tickets and sales documents.

Write-off. The removal of an uncollected commitment amount from the totals of anticipated revenue.

Altru for No-Longer-Beginners

Congratulations! If you've read this book, hopefully you no longer consider yourself a "beginner" at *Altru*. Now you have a better understanding of the larger concepts of *Altru* and how the various features work together to help support your mission. If you need a refresher, you can always visit these pages to familiarize yourself with a concept or feature again. As you work in *Altru*, there are other resources at your fingertips as well.

Help file. You may have noticed that while this book went into detail about the features *Altru* provides and why you'd use them, it didn't really get into *how* you perform tasks for those features. Throughout *Altru*, you can access a help file that provides detailed instructions and guidance for the features. To access the help file, click the **Help** button to launch a panel of resources that overlays the program. You can also click the **Help** icon on a screen to access its specific help topic.

User guides. If you're really looking for a sequel to this guide, there are several user guides available for *Altru*. Each user guide provides in-depth detailed information and screen captures for a specific area. For example, if you're interested in more detail about the *Tickets* features, there's a guide for that. You can find all the *Altru* user guides in a portable document format (PDF) at <https://www.blackbaud.com/howto/altru.aspx>.

Videos. Tired of reading? Or just feel like you really have to *see* it to understand it? No worries. There are many videos available as training on tasks and features in *Altru*. Feel free to throw a bag of popcorn in the microwave, sit back, and watch the short but educational videos located at <https://www.blackbaud.com/howto/altru-videos.aspx>.

Knowledgebase. If you have specific issues that you're trying to work through, or if you need help troubleshooting why you're not getting the results you expect, visit the Knowledgebase. In addition to the content available through the help file, you'll find helpful solutions and instructions to help get the most out of *Altru* in certain scenarios. You can access the Knowledgebase at <https://www.kb.blackbaud.com/>.

Community. Join the community of Altru users where you can ask questions, share ideas, access resources, and learn about upcoming events and new features. You can access the community at <https://community.blackbaud.com/products/altru>.

With these resources (and this guide, which you can always flip through again), you're well equipped to get the most out of *Altru* as you effectively *plan*, *manage*, and *analyze* your various efforts associated with your mission. And that, as they say, is "the hat trick!"



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