New Features Guide

4/11/2023Blackbaud Altru 5.28 New Features US

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NewFeatures-2023

New Features for Blackbaud Altru 5.28

Apply Appeals to Online Donations 3
Enhancements to Unresolved Online Sales Orders 6
View Password Requirements on Web Forms 8
API Authentication Updates 8

Before you use the new ***Blackbaud Altru*** features released in March 2023, we recommend that you review the information in this guide. It will help you and any other ***Altru*** users in your organization get the most from the enhancements we introduced.

Apply Appeals to Online Donations

To better track your solicitation efforts, you can now apply appeals to donations made through online sales. The latest release enables you to:

- Configure donation forms to automatically add appeals to donations.
- Display multiple appeals on a donation form to let your donors choose.
- Create custom donation form URLs to use in digital marketing efforts.
- Manually add appeals to existing online donations.

Configure donation forms

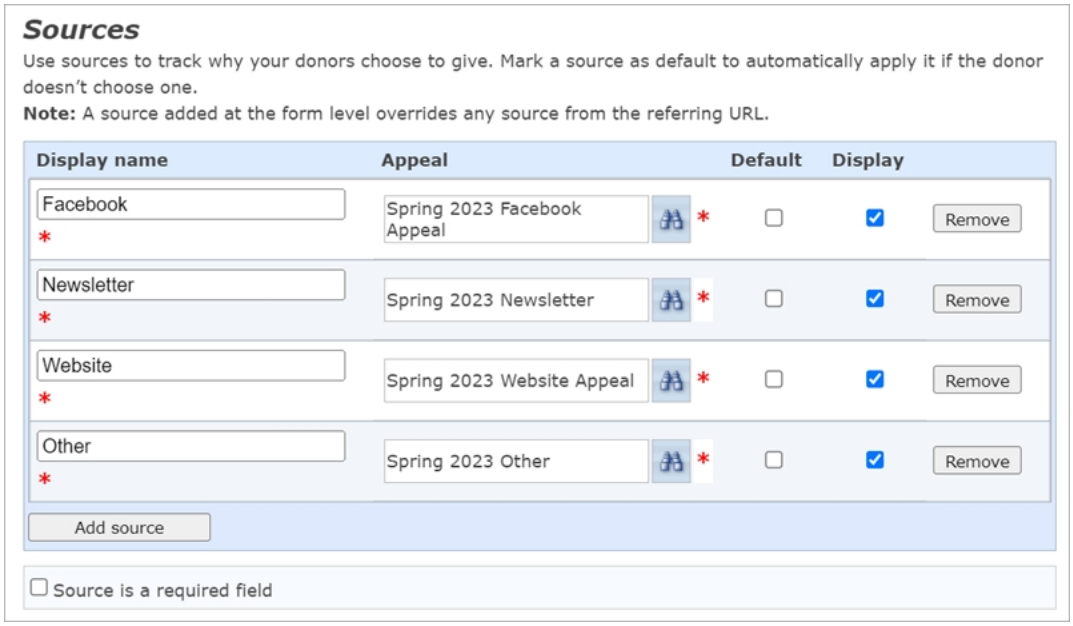
From a donation form's settings, you can now use *sources* to link donations to specified appeals. Add and display multiple sources to let your donors choose, or add a single, default source to automatically apply the same appeal to all donations given through the form.

1. From *Web*, **Manage donation forms**, expand a form's row.
2. Select **Options**.
3. Under **Sources**, select **Add source**.
4. Enter a display name and choose which appeal to add to donations.

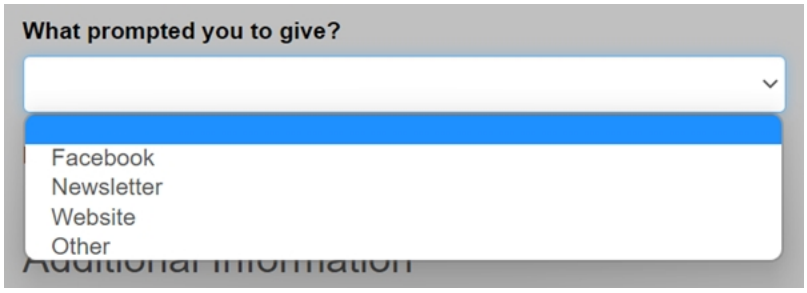
   Tip: If you plan to display the source on your donation form, use patron-friendly language.

5. Select whether the source is the form's default. If a donor gives through your form and doesn't choose a source, the form automatically adds the default appeal to the donation.
6. Select whether to display the source on your donation form.
7. To require donors to choose a source, select **Source is a required field**.

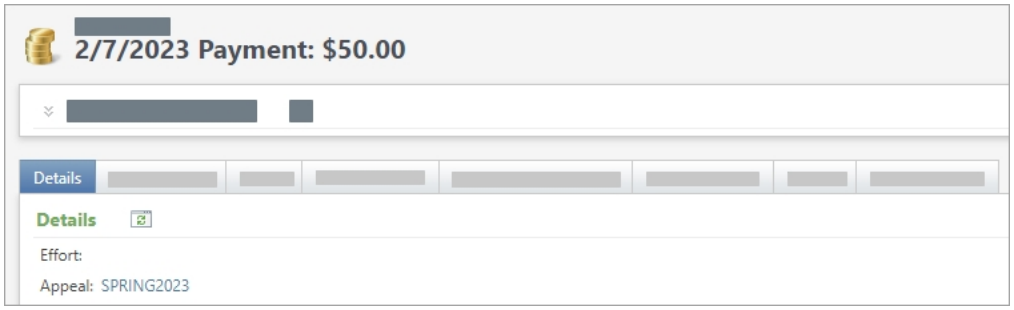
   Note: If you choose this setting, at least one source must be set to display.
8. Continue adding sources as necessary. When finished, select **Save**.



On the donation form, sources you set to display appear in a new field, "**What prompted you to give?**"



When donors give, the appeal displays under the donation's payment record details.



Track donations through custom form URLs

Now when you share your ***Altru*** donation form online — such as through a website, social media post, or email — you can include a custom URL to automatically add an appeal to donations you receive.

To create the URL, first configure the donation form's sources as outlined above. Then, add a source tag to the form's URL:

1. From *Web*, **Manage donation forms**, expand a form's row.
2. Copy the donation form URL (such as https://1234.blackbaudhosting.com/1234/OnlineGiving).
3. At the end of the URL, add **?source=** followed by the appeal name (such as ?source=SPRING2023EMAIL).

> ***Tip:*** If your appeal name contains spaces, replace each space with **%20** — for example, **GIVING TUESDAY** becomes **?source=GIVING%20TUESDAY**.

Examples:

Original URL	Appeal	Custom URL
https://1234.blackbaudhosting.com/1234/OnlineGiving	SPRING2023EMAIL	https://1234.blackbaudhosting.com/1234/OnlineGiving?source=SPRING2023EMAIL
https://1234.blackbaudhosting.com/1234/OnlineGiving	SPRING2023FACEBOOK	https://1234.blackbaudhosting.com/1234/OnlineGiving?source=SPRING2023FACEBOOK
https://1234.blackbaudhosting.com/1234/OnlineGiving	Giving Tuesday	https://1234.blackbaudhosting.com/1234/OnlineGiving?source=Giving%20Tuesday

When donors give through your custom URL, ***Altru*** automatically adds the appeal to their donations.

> ***Tip:*** Always test your custom URL before sharing it with supporters.

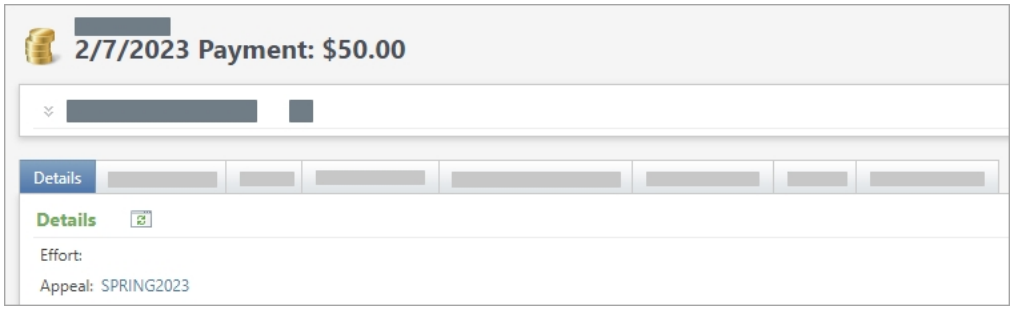
> ***Note:*** A source added at the donation form level overrides any source from the referring URL. If you plan to track donations via a referring URL, we recommend you don't mark any sources as default.

Add an appeal to a donation record

From its payment record, you can manually add an appeal to an existing donation made through online sales.

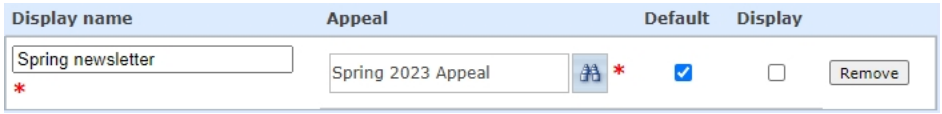
1. From *Revenue*, **Transaction search**, use search criteria to find the donation.
2. From the search results, select the payment to open its record.
3. Under **Tasks**, select **Manage appeal**.
4. Select an appeal, then **Save**.

The appeal displays under the donation's payment record details.



Reminders and best practices

- To automatically add the same appeal to all donations given through a form, configure only one source and mark it as default.



- To use a source tag to create a custom URL, the source must first be configured from the donation form's settings.
- If you plan to use custom URLs, don't mark any sources as default. A source added at the form level overrides any source from the referring URL.
- Always test a custom URL before sharing it with your supporters.
- When you configure sources, keep in mind your organization's appeal structure and how donations will appear in your appeal reports.
- In ***Altru***, the appeal displays under the donation's *payment record* details.

For more information about appeals, see Appeals.

For more information about donation forms, see Donation Forms.

Enhancements to Unresolved Online Sales Orders

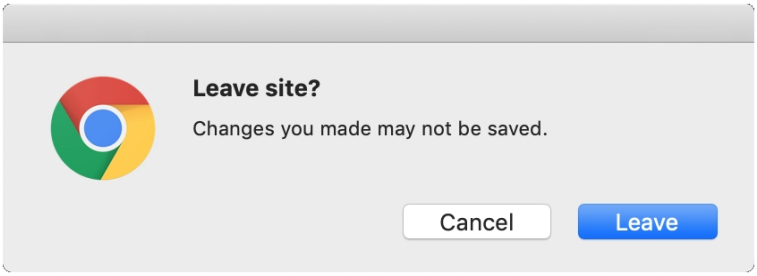
In this release, we made the following enhancements to unresolved online sales orders:

- To help prevent unresolved orders that occur because of failed payments, the checkout form now warns users if they attempt to leave the page while a payment is in progress.
- To help you quickly resolve unresolved orders, you can now subscribe to email alerts and receive notice as soon as they happen.

Payment form warning

Unresolved online sales orders can occur if the checkout form fails to complete a payment. For example, if a website user accidentally closes the page while a payment is in progress, the form may not have captured all required info.

To help prevent these instances, users now receive a warning if they attempt to leave the page.

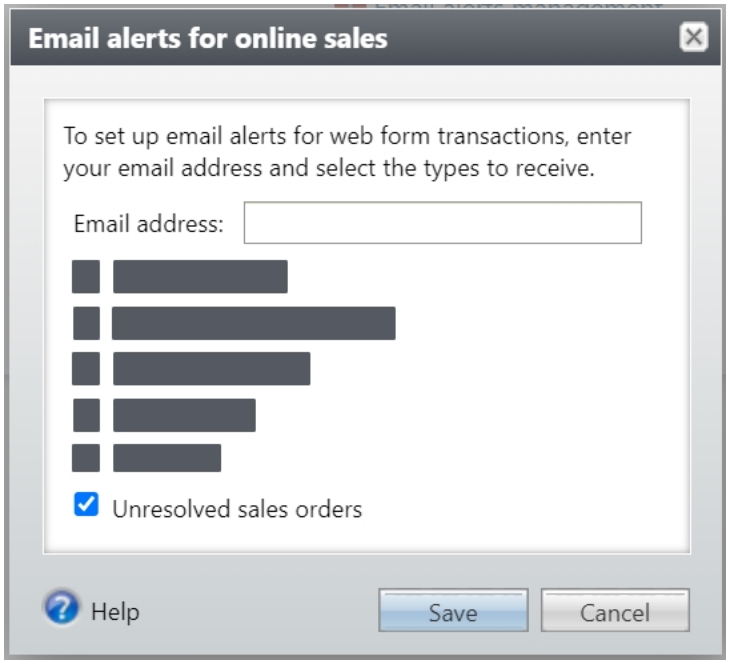


Note: The form displays the default prompt for the user's web browser. The exact message may vary.

Email alerts for unresolved orders

Email alerts help you track activity on your web forms. Now, you can choose to receive notice when an unresolved online sales order occurs.

To subscribe to email alerts, from *Web* or *Sales*, under **Configuration**, select **Email alerts for online sales**. Enter your email address, select **Unresolved online sales orders**, then **Save**.



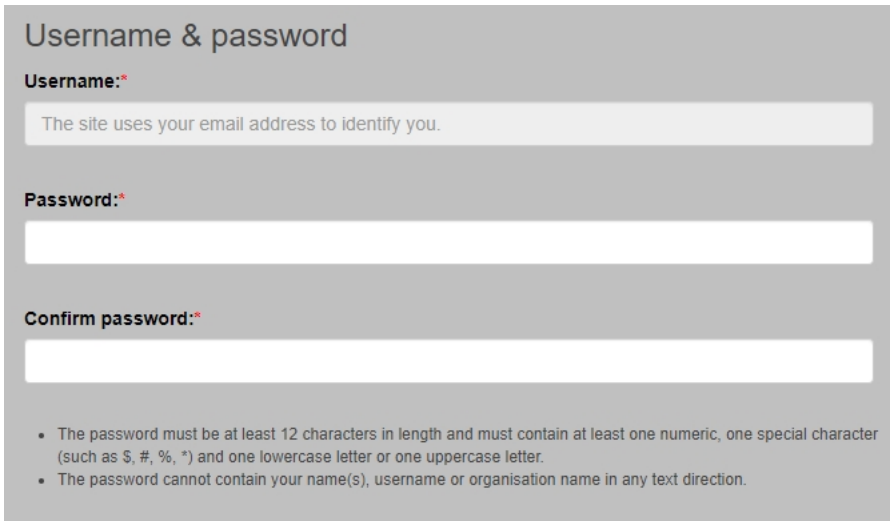
When an unresolved order occurs, you receive an email with the subject line: *Altru Alert - New online sales order: Unresolved*.

For more information, see Unresolved Online Sales Orders.

View Password Requirements on Web Forms

To make it easier for web form users to create or reset their passwords, web forms now display password requirements. Previously, forms only displayed requirements after a user entered an invalid password.

Passwords must be at least 12 characters long and include at least one number, one special character, and one lowercase or uppercase letter. Passwords cannot contain a user's name, username (email address), or organization name.



API Authentication Updates

For those of you who use custom applications that integrate with ***Altru***, this release includes an important security update. As part of this update, **all API requests must now include an Altru database name.**

Recommended actions:

- **Partners and developers** — We recommend you review existing integrations and customizations to verify that an ***Altru*** database name is included in your requests. To see a code sample that includes a database name, see the Authentication and Authorization developer guide on our Altru API for Partners resource site.
- **Altru customers with custom apps and integrations** — It's possible that no action is needed. However, if your API integration no longer connects after the upgrade, notify your integration partner and reference this update.

For more information about the change, visit Knowledgebase.