

New Features Guide

05/14/2020 Blackbaud Altru 5.17 New Features US

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NewFeatures-2020

New Features for Blackbaud Altru 5.17



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Before you use the new **Blackbaud Altru** features released in May 2020, 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.

Globally Extend Membership Expiration Dates

The Blackbaud Altru Membership Utility can be used to extend the expiration dates of multiple memberships at once. With the utility, you can choose which records to update, how long to extend expiration dates, and how many records to update at a time.

When you run the utility, it attempts to update the expiration dates of all selected memberships and any associated printed or issued membership cards. You can view and download results each time you run the process to determine which updates succeeded or failed.

Get started

The Blackbaud Altru Membership Utility is an application – separate from **Blackbaud Altru** – that you install and run on your machine. Only Windows operating systems are supported at this time, and you must have appropriate permissions to install software on your machine.

To access the utility, from the [Blackbaud Product Downloads](#) page, select **Blackbaud Altru Membership Utility**, then select **Download now**.

Determine which memberships to update

Before you run the utility, determine which memberships to update via a memberships ad-hoc query. You can use an existing query or build a new one.

Whether you use a new or existing query, there are a few requirements:

- The ad-hoc query must have a memberships source view.
- The membership **system record ID** and **expiration date** fields must be included in the query output.

To build a new ad-hoc query:

1. From *Analysis, Information library*, select **Add an ad-hoc query**.
2. Select the **Memberships** source view and click **OK**.
3. Select filter criteria and output fields as needed.
 - To view a list of recommended filter criteria and output fields for this utility, visit our [Knowledgebase](#).
 - For optimal performance, we recommend you add *Members\Primary member is equal to Yes* to your filter criteria.
 - Ensure membership **system record ID** and **expiration date** are included in your query output. Without these required fields, the utility won't run.
4. When finished, enter a name and save the query.

Note: While you can add as many output fields as needed, only the following information displays when you preview results in the utility: membership system record ID, member name, membership status, and membership expiration date. To preview records in more detail, we recommend you process the query and view its results within **Blackbaud Altru** before you use the utility.

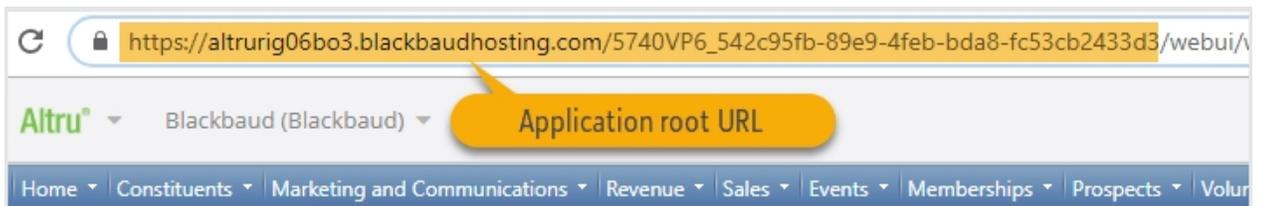
Considerations

- We recommend you don't make changes to your ad-hoc query while using the utility.
- We recommend you don't run other major business processes within **Blackbaud Altru** while using the utility.
- The more results in your query output, the longer the process may take to complete.

Run the utility

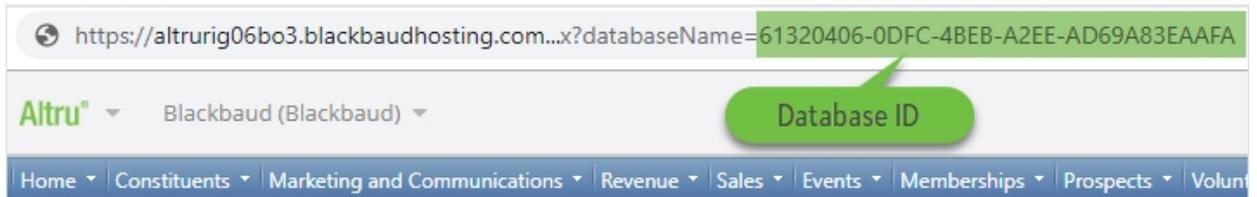
Note: To run the utility, you must have a system role in **Blackbaud Altru** that enables you to run ad-hoc queries and update memberships – such as Membership Manager or Development Data Entry.

1. To log in to the utility and connect to **Blackbaud Altru**, enter the following fields:
 - **Application root URL:** The first portion of the URL in the browser address bar when you're logged in to **Blackbaud Altru**. The portion of the URL before /webui is your root URL.



- **Database:** The unique ID present in your URL when you're logged in to

Blackbaud Altru. The portion of the URL after `databaseName=` is your database ID.



- **Blackbaud ID:** The email address you use to log in to **Blackbaud Altru**.
 - **Password:** The password you use to log in to **Blackbaud Altru**.
2. The Blackbaud Altru Membership Utility screen appears.

3. In **Ad-hoc query name**, enter the exact name of the membership ad-hoc query that contains the memberships to update.
4. Under **Extend expiration dates**, choose whether to extend memberships to end of month or by a specific number of months.
 - To extend a membership to the end of its current expiration month – such as from 06/10/20 to 06/30/20 – choose **to end of month**.

- To extend a membership by a specific number of months, select **by # of months**. Enter the number of months to extend memberships and specify whether to set the new expiration date to the same day of month as current expiration date, or to the end of month.

Note: All printed or issued membership cards associated with the membership will also be extended.

5. Use the **Minimum record** and **Maximum record** fields to specify which records in the query to update. For example, to update the first 500 records in your query, enter Minimum record = 1 and Maximum record = 500.
6. Click **Preview changes** to load the memberships and verify proposed changes. The **New expiration date** column displays the expiration date that will be assigned to each membership after the utility is run.
 - To view these records in a spreadsheet, click **Download CSV**.
 - If you make changes to any fields, such as **Months to extend**, click **Preview changes** before you proceed.
7. After you confirm the proposed changes are correct, click **Start process**. The process runs and attempts to update the expiration dates of all specified memberships and their printed or issued membership cards.

Warning: *This action can't be undone.*

8. When the process finishes, the results display. Review the results to determine if any further action is required.
 - To view the results in a spreadsheet, click **Download CSV**. We recommend you always download a copy of the results.
 - If your query output displays multiple members per membership, details about membership cards only appear in the primary member's row.
9. If necessary, repeat the process until all memberships are updated.

Note: If you run the process multiple times with the same query, you may need to update the **Minimum record** and **Maximum record** values to ensure you don't update the same membership twice.

Partially Refund Event Packages

You can now issue partial refunds for event packages, such as to retain a cancellation fee for a patron who can no longer attend, or to credit a member who didn't receive their discount.

To access the Refunds page, from *Sales*, under **Manage orders**, click **Refunds**.

When you choose to refund an order that contains an event package, in the **Refund** column, you can now enter the specific amount to refund.

Refunds

Order #10000711

Ken Lewis
 100 Main St
 Charleston, SC 29401

Go to Order #10000711

Tip This order contains items you can reschedule.

[Go to Reschedule tickets](#)

Items to be refunded

<input checked="" type="checkbox"/>	Name	Registrant	Bar code #	Price	Discount	Amount	Refund
<input checked="" type="checkbox"/>	April Package Week 2 - Child - 04/...	Ken Lewis		\$100.00	(\$5.00)	\$95.00	\$80.00

Value of items to be refunded: **\$80.00**

Payment details

<input checked="" type="checkbox"/>	Payment method	Refund method	Amount	Reason:	
<input checked="" type="checkbox"/>	\$95.00 Cash	Cash	\$80.00	<input type="text"/> Comment: <input style="width: 150px; height: 40px;" type="text"/>	<div style="margin-top: 5px;"> Order total: \$95.00 Order discounts: (\$5.00) Tax refund amount: \$0.00 Refund total: \$80.00 </div>

Enhancements to Credit Card Processing in Group Sales

In previous releases, we made several enhancements to credit card processing in Daily Sales and Advance Sales. In this release, we've made similar enhancements to your Group Sales payment forms.

Process credit cards through Blackbaud Checkout

Credit card payments entered through Group Sales reservations are now processed through **Blackbaud Checkout**. Your payment forms will be updated automatically and there is no additional configuration necessary.

COMPLETE PAYMENT

Swipe now or enter card information below

Name on card

Card number

MM/YY CSC

\$42 Finish and pay →

Processed securely by Blackbaud

Indicate whether a card is present

You can now indicate if a physical card is present when you select **Credit** from the Add payment screen of a Group Sales reservation.

- To physically swipe a credit card through a card reader device, select **Card present**.
- To key in the credit card information, such as when you accept a payment over the phone, select **Card not present**.

Add a payment

Balance: \$600.00

Amount:

Payment information

Payment method:

Credit card option: Card present
 Card not present

Receipt Options

Receipt method:

Help Save Cancel

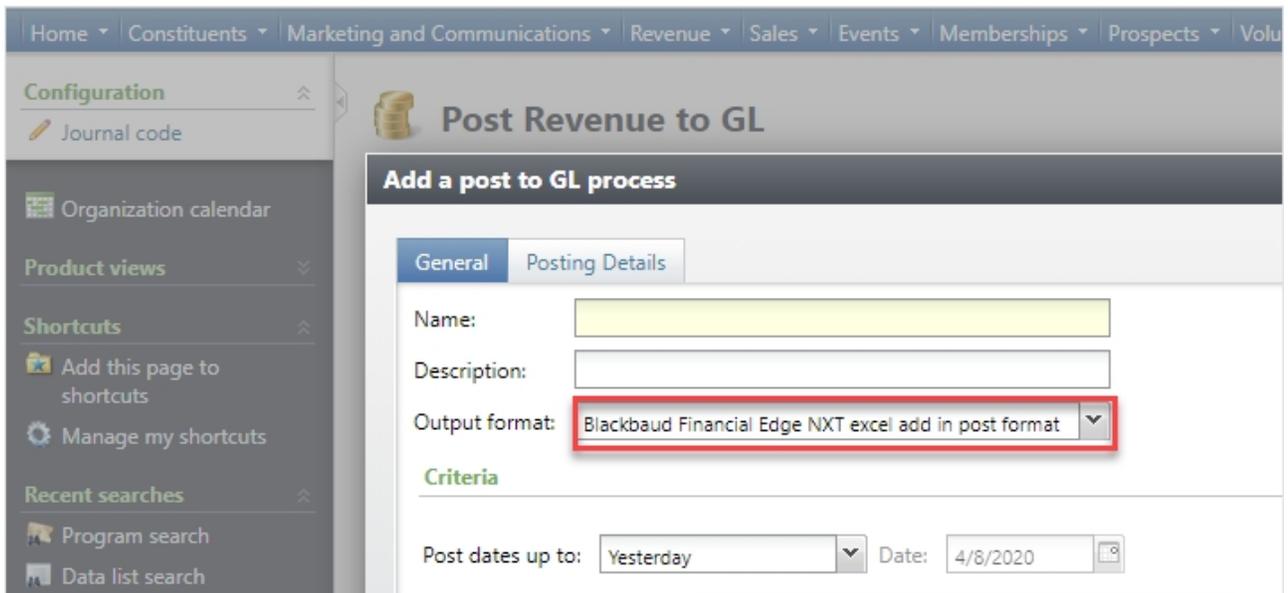
For your convenience, the Add a payment form remembers which option you select. The next time you add a credit card payment from a Group Sales reservation, the card option defaults to your most recent selection.

New Post to GL Output Format for Blackbaud Financial Edge NXT

For those of you with general ledger enabled, we've added a new output format designed for use with **Blackbaud Financial Edge NXT**. The new format separates debit amount and credit amount into separate columns, making it easier to use the Journal Entry Batch Creator Excel Add-In when you import a post file into **Financial Edge NXT**.

Note: The Journal Entry Batch Creator Add-In is an application built by Blackbaud and is available in Microsoft's Office Store. For more information, see [Journal Entry Batch Creator Excel Add-In](#).

When you add or edit a post process from **Post Revenue to GL** under *Financials*, select Blackbaud Financial Edge NXT excel add in post format under **Output format**.



After you run the post to GL process, you can copy the data from the columns in your post file and paste into the file created by the Journal Entry Batch Creator Add-In.