

Blackbaud CRM™ Capabilities Delivered in 2016

Improving Our Solutions with Your Feedback

Blackbaud CRM can help you engage more constituents, build stronger relationships, and meet fundraising challenges by providing a complete supporter view and an organization-wide toolset for managing your constituent base.

In 2016, Blackbaud CRM delivered new capabilities designed to improve time-to-value, increase mission impact, and reduce operating cost. Several of these developments came from customer suggestions and feedback submitted through the [Ideas Portal](#). Here is a high-level summary of key enhancements by functional area.

Major Giving and Fundraisers



Additional Revenue Types Tied to Opportunities (SP10)

Track high-impact donations with increased flexibility by linking additional revenue types to opportunities like event registrations, matching gift claims, and planned gifts. This expands the use of opportunities to cover a broader range of gift types and helps fundraisers better manage their portfolios.

Locations for Constituent Interactions and Major Giving Plan Steps (SP11)

Power your fundraisers with the ability to check and map meeting locations when away from the office with Location support for interactions and steps. Fundraisers can select between active addresses on the prospect record or select Other to add a free-text location.



You asked, and we listened!

Many of the improvements we made to Blackbaud CRM came directly from your feedback. These developments are marked here with a light bulb icon.

Constituent Management and Revenue



Add Group Members in Bulk (SP6)

Adding multiple constituents to a group at once makes group management more efficient.



Interactions List Builder (SP7)

Manage constituent interaction information with more visibility and flexibility with the new Interactions list builder. The interactions data list has been converted to the list building format to include more advanced options for sorting, navigating, and customizing data in the list to give users data in a format that best meets their needs.

Refunding and Reconciliation Improvements (SP7)

Improvements to the refunding and reconciliation handling provide increased insight to transaction types and ability to query on information.

Credit Card Tokenizer (SP10)

Streamline your ability to leverage third-party vendors with our new tokenization process. The Blackbaud CRM Credit Card Tokenizer now provides the ability for vendors to securely send sensitive credit card information to the Blackbaud Payment Service for tokenization. The vendor can then destroy any sensitive credit card information and return only the secure token information to your organization to import into Blackbaud CRM.

Sustained Giving

Credit Card Updater (SP6)

With Blackbaud Merchant Services™, organizations can keep their sustained giving programs current by using a subscription service to maintain accurate credit card data. The Credit Card Updater service allows organizations to avoid declined transactions, save time contacting donors, reduce cancellations of recurring gifts, and keep donor credit card information current by proactively receiving credit card updates directly within Blackbaud CRM.

Recurring Gifts in Data Warehouse (SP10)

Enjoy an improved reporting experience from the Blackbaud Data Warehouse by using additional recurring gift information, including first installment, last installment, recurring gift amendments, and more.



Recurring Gift Status (SP7)

Gain increased access to recurring gift information with the ability to query on recurring gift status. The new Recurring Gift Amendments node provides access to recurring gift status and related fields for improved reporting and decision making.

Reporting and Search

Recognition Credits Giving List (SP10)

Use our list-based report functionality to create powerful and flexible giving list reports based on recognition credit information instead of just revenue information. Users can add columns, filter, sort, and export to Excel® for further analysis. The giving list generates from the Blackbaud Data Warehouse for fast processing and optimized performance.



Search and Query by Site (SP7)

The new site field on constituent search screens improves searching abilities.



Query Node Additions (Various SPs)

New nodes available in query through multiple 2016 service packs provide increased access to information and improved query usability. Additions include recurring gift status information, educational institution information, stored values constituencies, credit card refunds, invitee and invitation information, and more.

Performance and Quality



Smart Field Organization (SP7)

Manage your smart fields with ease with the ability to assign a category to smart fields for improved organization.

AddressFinder™ and DeceasedRecordFinder™ (SP9)

AddressFinder and DeceasedRecordFinder improvements increase the performance and security of processes in data tune-up.

Blackbaud Data Warehouse ETL Snapshots (SP11)

Improve performance with the Blackbaud Data Warehouse ETL (Extract, Transform, Load) refresh process by using ETL Snapshots. With this setting, ETL refreshes create a database snapshot for the process to run against rather than the OLTP (Online Transaction Processing) database itself. The snapshot is automatically deleted after use. This process improves performance and allows organizations to run ETL refresh processes efficiently.

For a complete list of recent updates and to stay on top of general release information, visit the [Blackbaud CRM Community online](#).

To learn more about Blackbaud CRM, visit www.blackbaud.com or contact your Blackbaud account representative. >