Blackbaud CRM Version 4.0
Taking Blackbaud CRM to the Next Level

Blackbaud CRM brings industry-leading fundraising, online applications, actionable prospect research and analytics, and multichannel direct marketing together in one platform to enable an integrated view of the constituent experience across your organization. By offering the only organization-wide solution that helps nonprofits efficiently manage traditional and nonprofit CRM responsibilities, Blackbaud CRM empowers organizations to build deeper and more personalized relationships with supporters.

The new release of Blackbaud CRM features exciting enhancements designed to increase usability, improve quality, strengthen performance, and push the boundaries of constituent engagement and fundraising.

- **Usability:** Improve the user experience and save time with features that provide a more powerful constituent view, streamline common tasks, and reduce manual effort.

- **Quality:** Upgrades are easier than ever thanks to significant improvements in frameworks and stability.

- **Performance:** We're separating reporting and transaction activity, addressing strategic areas of CRM, and employing new capabilities of SQL Server® to improve performance across the board.

- **Innovation:** Enjoy major new functionality including reporting tools, use of List Builder–our list-based reports that empower users to quickly filter and find information, integrated API for secure online payments, and more.

Intuitive, Intelligent, Adaptable Usability

GIVING LIST REPORT: Use our list-based report functionality to create powerful and flexible giving list reports. Users can add columns, filter, sort, and export to Excel® for further analysis. The giving list generates from the data warehouse for fast processing and optimized performance.

CONSTITUENT RECORD REDESIGN: Gain insight into constituent activities with summary tiles that show important information at a glance. A more user-friendly constituent record includes "View As" and "More Information" tabs with common actions taken from the first screen on the record. Constituent tabs and tiles can be customized by each user to ensure maximum usability.

GENERAL USABILITY FEATURES: We've made a number of enhancements throughout the solution to improve usability by remembering your previous choices. In the advanced search options of constituent search, your selections remain in place each time you access the screen. You can also drag and drop tabs and sub-tabs into any order you prefer for any record type. This sticky setting is saved the next time you access any record of the same type.

ACTIVE USER MONITORING: Capture and analyze user session data with new active user monitoring tools. Use active user monitoring to determine peak usage dates and times, average session lengths, and the frequency with which users are logged in.

RECOGNITION CREDITS AND ANONYMOUS RECOGNITION: Take advantage of new management features to add and edit recognition credits on the "Recognitions" screen through the enhanced revenue batch and revenue update batch. Organizations can also set how they want recognition credits to be honored by anonymous gifts.

INFORMATION LIBRARY: Manage queries and KPIs with ease in a new information library. This single location consolidates and simplifies queries and provides the ability to organize by folder or locate by category, owner, or record type.

QUERY AND EXPORT UPDATES: Enjoy new query and export features designed to increase flexibility and usability. We've added the ability to view exports associated with a query or selection, added "Save As" functionality for queries and exports, created a new streamlined way to mark queries as favorites, removed the 500 row export limit for queries, added the ability to create exports from sections, and improved access to query source views for business processes.

SOLICITORS ON OPPORTUNITIES: Users now have the expanded flexibility to assign solicitors at the opportunity record level. This new ability allows users to credit individual fundraisers for their associated opportunities only and track the revenue that fundraisers generate in greater detail.

BLACKBAUD INTERNET SOLUTIONS DIRECTORY ENHANCEMENTS: We've expanded the range of Blackbaud CRM education and employment fields to provide online users with the ability to search and view a wide variety of fields, including degree, degree type, division, department, sub-departments, start date, end date, program type, organization industry, job category, and job title. We've also made the search functionality faster by creating a quick toggle between profile display and back to directory search results.

Consistent, Flexible, Dependable Quality

ENHANCED WEB BROWSER INTERFACE: Enjoy complete web deployment and support of Chrome™ and Firefox web browsers as well as iOS environments. Feature support in the browser-based version allows system users to increase efficiency and leverage the full functionality of the prior Windows-based version. Features now available in web browser include "Write a Letter," "Edit a Letter," "Query Save As," and "Export Definition Save As."

MEMBERSHIP INSTALLMENTS: Expand membership installment support with new features to create "irregular" membership installment plans, post membership installment plans to the general ledger, and store credit card and debit card payment information for membership installment plans. Users can also update "Add a Membership" and "Membership Dues Batch" to support partially paying a membership installment.

PLEDGE INSTALLMENTS: Increase efficiency with pledge installment updates, cutting editing time in half on scenarios with multiple designations. Users can enter installment amounts, automatically calculate number of installments, and pay multiple designations on different schedules—all on an efficient and resizable screen.

EVENTS WITH DESIGNATIONS: New features increase flexibility on events with designations to support partial payments and adjustments of existing event registration payment amounts and event registration information.

Efficient, Tuned, Responsive Performance

MARKETING TEMPLATES: A powerful marketing template builder enables you to create templates to match the business practices for each type of communication. Users can select a record type appropriate for an effort, configure the functionality appropriate by communication type, load default values for marketing efforts, lock values for marketing efforts, and enforce naming conventions.

REVENUE AND CONSTITUENT SUMMARY: Enjoy performance updates when navigating to the "Revenue Summary" and "Constituent Summary" screens in the constituent record. Users should experience faster performance when saving the "Edit Posted Payment" screen or when committing a revenue update batch. We also have added date range filters to the Revenue History, Revenue Summary, and Recognition Summary tabs of a constituent to improve performance and provide a more precise view of information.

CREDIT CARD RECONCILIATION: Promote a more efficient and streamlined workflow with our enhanced credit card reconciliation process. Users can identify and work with all reconciliation items from the "Reconcile transactions and disbursements" page in Treasury.

APPLY TO COMMITMENTS IN BATCH: Leverage new enhancements that improve the use and efficiency of the Apply To Commitments screen accessed from an Enhanced Revenue Batch and Revenue Update Batch. Use new search filter options to filter the list of commitments based on designation lookup ID as well as the associated constituent name. For easier identification and sorting, the Description column now displays the designation or event lookup ID and the new constituent column displays the associated constituent name.

CONSTITUENT QUERY FROM BLACKBAUD DATA WAREHOUSE: Leverage a flatter, simpler query view to process queries faster and reduce the burden on the transactional database.

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💡 Future-Proof, Groundbreaking, Extensible Innovation

RESEARCHPOINT™ LIST REFRESH: Bring greater perspective to your organization with powerful updates to the ResearchPoint list refresh. New features include easy-to-use, add, and edit forms; favorites; categories; model score; and rating attribute support, along with insightful widgets and a nightly refresh. The List Builder can be used with over 70 ResearchPoint columns and offers the flexibility to move columns, add them on the fly, auto-resize, view pop-up wealth summaries, direct drill into records, and access lists directly from records.

RESEARCHPOINT PROSPECT DATABASE: Innovative updates to the prospect database make this the most powerful ResearchPoint version to date. New tile display with configurable tiles allows users to quickly view and act on critical information. Additional updates include a new advanced search experience and the inclusion of new data assets: NOZA, Thomson™, and Experian® sources.

EXPANDED APIS IN BLACKBAUD INTERNET SOLUTIONS: Use enhanced API endpoints to allow custom parts to use Blackbaud's secure payments service and ensure PCI-compliant payment facilitation.

OPEN DATA PROTOCOL (ODATA): Users now have secure, http-based access to data in the CRM database or data warehouse via OData. Users can build powerful reports and perform analyses using favorite third-party tools, like Excel® or Tableau, and publish to their existing, internal portals.

SUSTAINED GIVING UPDATES: Enjoy significant new enhancements designed to help you effectively manage and grow your sustained or recurring giving programs. Enhancements include a comprehensive activity timeline to display activity associated with a recurring gift, a redesigned gift record, reorganized transaction summary and detail information, and new features to skip installments, update recurring gift statuses, and write off transactions.

ROLLING DATE FILTERS IN AD-HOC QUERY: Leverage rolling date query filter criteria in ad-hoc queries for date periods, single dates, and date ranges. Rolling date filters are available for Blackbaud data warehouse-based queries only and are enabled through the SDK for date fields in custom query view specs.

ONLINE HELP PANEL: Empower users with a new tabbed panel that brings online help topics directly into the program. The new Help Panel offers improved usability with a modern update.

In case you haven't upgraded in a while, some of the key highlights from prior versions include online membership support, mobile enhancements for major gift officers, auto-reconciliation tools with Blackbaud Merchant Services™, and improved duplicate resolution tools.

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 Version 4.0, visit www.blackbaud.com or contact your Blackbaud account representative ❯