

Luminate CRM New Features Guide

2/7/2013 Blackbaud Luminate Q1 2013 Luminate CRM New Features US

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New Features

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The following sections describe new features and updates to existing features in Luminate CRM Q1 2013. Please share this information with other users in your organization.

Gift Processing

The main focus of this release was to fully integrate TeamRaiser gift processing between Luminate CRM and Luminate Online. In addition to that, several enhancements were made to batch gift processing: the ability to customize the **New Contact** entry form, add custom look-up fields, and add Tributes.

Synchronizing TeamRaiser Gifts Between Luminate CRM and Luminate Online

This release marks the full integration of TeamRaiser gifts between Luminate CRM and Luminate Online. When you enter TeamRaiser gifts in Luminate CRM, they now synchronize with Luminate Online, and, thus, the Participant Center too. You can enter both online and offline gifts as either a single donation or in batch.

New Offline Payment Types

To signal the service bus to synchronize an offline TeamRaiser transaction entered in Luminate CRM, you can now select **Credit Card Offline** and **ACH Offline**. This payment type is available in both single-donation entry and batch entry.

Note: Offline and online payments in Luminate CRM are lumped together as credit card and ACH payments in Luminate Online. Luminate Online does not have a separate "offline" category.

- **Location of the new payment types in the single-donation entry form:**

The screenshot shows a form titled "Payment Information" with the following fields and options:

- Payment Type: --None-- (dropdown menu open)
- Credit Card Type: --None--
- Bank Name: Check
- Check Number: Credit Card
- Check Date: ACH
- ACH Account Number: EFT
- ACH Routing Number: Credit Card Offline (highlighted), ACH Offline (highlighted)
- Posted:
- Posted Date: [12/4/2012 5:42 PM]
- Reversed:
- User Confirmation Code:

- Location of the new payment types in the batch entry form:

Note: Payment Type and Transaction Type are now required fields in the batch entry form.

TeamRaiser Gifts CONFIGURED Payments entered: \$0.00 of \$100.00 Items ready: 0 of 10

Did you know?
Tabbing into the next row will automatically save the one you just edited.

search entries Save Row Clear Row View Contact View Account Autofill Defaults

#	Status	Donor Donation Type	Gift Type	Amount Close Date	Campaign ID Designation	Transaction Type Payment Type	TeamRaiser
1		Kevin Durant Individual Gift	Single Donation	10 12/5/2012 [12/5/2012]	[Split]	Online Donation --None--	Kevin C...
2			Single Donation				
3			Single Donation				
4			Single Donation				
5			Single Donation				
6			Single Donation				

New TeamRaiser Fields in the Batch Entry Form

To enable processing TeamRaiser gifts in batch, two new lookup fields have been added: **TeamRaiser Participant** and **TeamRaiser Team**.

Fields

Donations New Pledges New Recurring Gifts

Configure Batch Fields and Layout

Optional Fields

- Receipt Date
- Received
- Recognition
- Segment Code
- Settlement Batch
- Source
- Stage
- Sub Source
- TeamRaiser Participant
- TeamRaiser Team
- Tribute
- Write-In Designation

Included Fields

Field	Required	Default Value	Locked
Donor	<input checked="" type="checkbox"/>	N/A	
Donation Type	<input checked="" type="checkbox"/>	Click to Edit	<input type="checkbox"/>
Amount	<input checked="" type="checkbox"/>	Click to Edit	<input type="checkbox"/>
Close Date	<input checked="" type="checkbox"/>	Click to Edit	<input type="checkbox"/>
Campaign	<input checked="" type="checkbox"/>	Click to Edit	<input type="checkbox"/>
Designation	<input checked="" type="checkbox"/>	Click to Edit	<input type="checkbox"/>
Transaction Type	<input checked="" type="checkbox"/>	Click to Edit	<input type="checkbox"/>
Payment Type	<input checked="" type="checkbox"/>	Click to Edit	<input type="checkbox"/>
TeamRaiser Participant	<input type="checkbox"/>		<input type="checkbox"/>
TeamRaiser Team	<input type="checkbox"/>	Click to Edit	<input type="checkbox"/>

Save Batch Layout

Customizing the New Contact Entry Form

Previously, when you added a new contact while in batch-entry mode, the available entry fields could not be changed. Now you can customize which fields display in the **New Contact** entry form and also specify which fields are required.

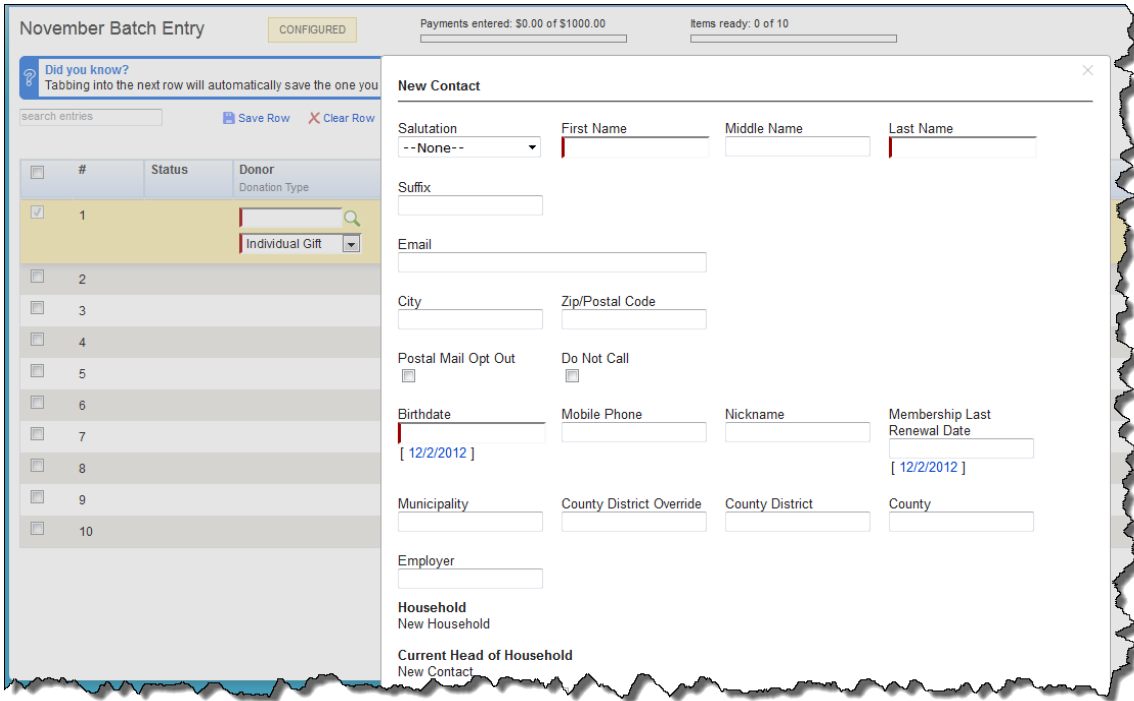
► To customize the New Contact entry form:

1. Click the **Configuration** tab.
2. Click **Batch Contact Fields**. The New Contact field picker displays.
3. Select the fields you want for creating new contacts in the batch entry form and specify whether they are required or not.

Note: The **Last Name** field is always required.

Field	Required
Salutation	<input type="checkbox"/>
First Name	<input checked="" type="checkbox"/>
Middle Name	<input type="checkbox"/>
Last Name	<input checked="" type="checkbox"/>
Suffix	<input type="checkbox"/>
Email	<input type="checkbox"/>
Mailing City	<input type="checkbox"/>
Mailing Zip/Postal Code	<input type="checkbox"/>
Postal Mail Opt Out	<input type="checkbox"/>
Do Not Call	<input type="checkbox"/>
Birthdate	<input checked="" type="checkbox"/>

4. Click **Save Contact Fields Layout**.



Batch Processing Enhancements

Enhancements to batch entry include the ability to add custom look-up fields to the batch gift entry form and to identify a gift as a tribute.

For more information, see the [Enhanced Batch Gift Processing video](#).

Add Custom Look-Up Fields

You can now add custom look-up fields to the batch gift entry form to associate a gift with another object. Custom Look-up fields can be added to single gifts, recurring gifts, and pledges. After you create the custom field, it will be available in the batch field picker.

Add Tributes in Batch

In batch mode, you can now enter gifts that are given in honor of or in memorial to someone. A new look-up field called **Tribute** allows you to identify the gift as a Tribute.

Donations | New Pledges | New Recurring Gifts

Configure Batch Fields and Layout

Optional Fields

- Receipt Date
- Received
- Recognition
- Segment Code
- Settlement Batch
- Source
- Stage
- Sub Source
- TeamRaiser Participant
- TeamRaiser Team
- Tribute
- Write-In Designation

Included Fields

Field	Required	Default Value	Locked
Donor	<input checked="" type="checkbox"/>	N/A	
Donation Type	<input checked="" type="checkbox"/>	Click to Edit	<input type="checkbox"/>
Amount	<input checked="" type="checkbox"/>	Click to Edit	
Close Date	<input checked="" type="checkbox"/>	Click to Edit	<input type="checkbox"/>
Campaign	<input checked="" type="checkbox"/>	Click to Edit	<input type="checkbox"/>
Designation	<input checked="" type="checkbox"/>	Click to Edit	<input type="checkbox"/>
Transaction Type	<input checked="" type="checkbox"/>	Click to Edit	<input type="checkbox"/>
Payment Type	<input checked="" type="checkbox"/>	Click to Edit	<input type="checkbox"/>
Tribute	<input type="checkbox"/>	<input type="text"/>	<input type="checkbox"/>

[Save Batch Layout](#)

TeamRaiser

As part of the work done to fully integrate gift processing between Luminate CRM TeamRaiser and Luminate Online TeamRaiser, Participation Types created in Luminate Online now synch back to Luminate CRM in a new look-up field.

Participant Type Look-Up Field

Previously, when you registered someone for a TeamRaiser event in Luminate CRM, you had to make sure that you entered the name correctly in the **Participant Type** text field exactly as the name was spelled in Luminate Online, or synchronization failed. This problem is solved with the addition of a new look-up field called **TeamRaiser Participant Type**. With the look-up field you can select from a list of the Participant Types associated with the event for which you are registering. The values are populated from the TeamRaiser event in Luminate Online.

Also, if you add a new Participation Type in Luminate Online, the system immediately synchs so the new type displays in the **CRM TeamRaiser Participant** field.

TeamRaiser Registration Edit Help for this Page

New TeamRaiser Registration

TeamRaiser Registration Edit

Information = Required Information

TeamRaiser Registration Name <input type="text"/>	Campaign <input type="text" value="Click lookup icon..."/> <input type="button" value="Search"/> <input type="button" value="Info"/>
Participant <input type="text"/> <input type="button" value="Search"/>	Team Captain <input type="checkbox"/>
Participation Type <input type="text"/>	Team <input type="text"/> <input type="button" value="Search"/>
Participant's Home Page <input type="text"/>	
Registration Date <input type="text" value="12/4/2012"/>	
Related Transaction <input type="text"/> <input type="button" value="Search"/>	
TeamRaiser Participation Type <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Info"/>	
Registration Fee <input type="text"/>	Additional Gift <input type="text"/>
Total Raised <input type="text"/>	Upsell Amount <input type="text"/>