

Luminate Online New Features Guide

3/6/2013 Blackbaud Luminare Q1 2013 Luminare Online 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 Online Q1 2013. Please share this information with other users in your organization.

Show Me: [Watch videos](#) about some of the features included in this release.

Advocacy

Changes to Advocacy in this release include, improved querying on Action Alerts and more frequent updates to the Vote Center.

Query by Action Alert

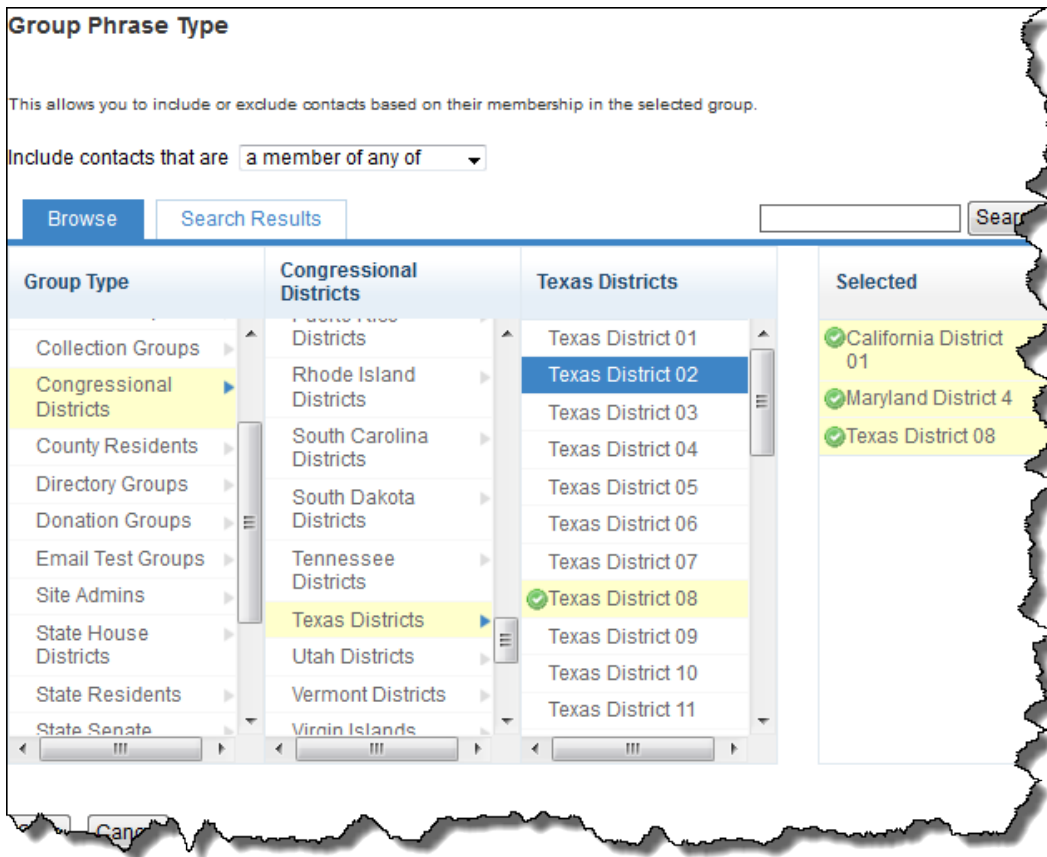
To send an email to the constituents of the representatives targeted in an Action Alert, you create a query-based group. Previously, the process of creating the query was very labor-intensive. The process is much faster with the new **Add an Action Alert Clause** button.

Note: The **Add an Action Alert Clause** feature is only available for Federal, State, and Custom targets. It is not available for local, County and Municipal targets. It is also only available for Action Alerts; not for Call Alerts, Vote Alerts, or Letter to the Editor Alerts.

The old query process:

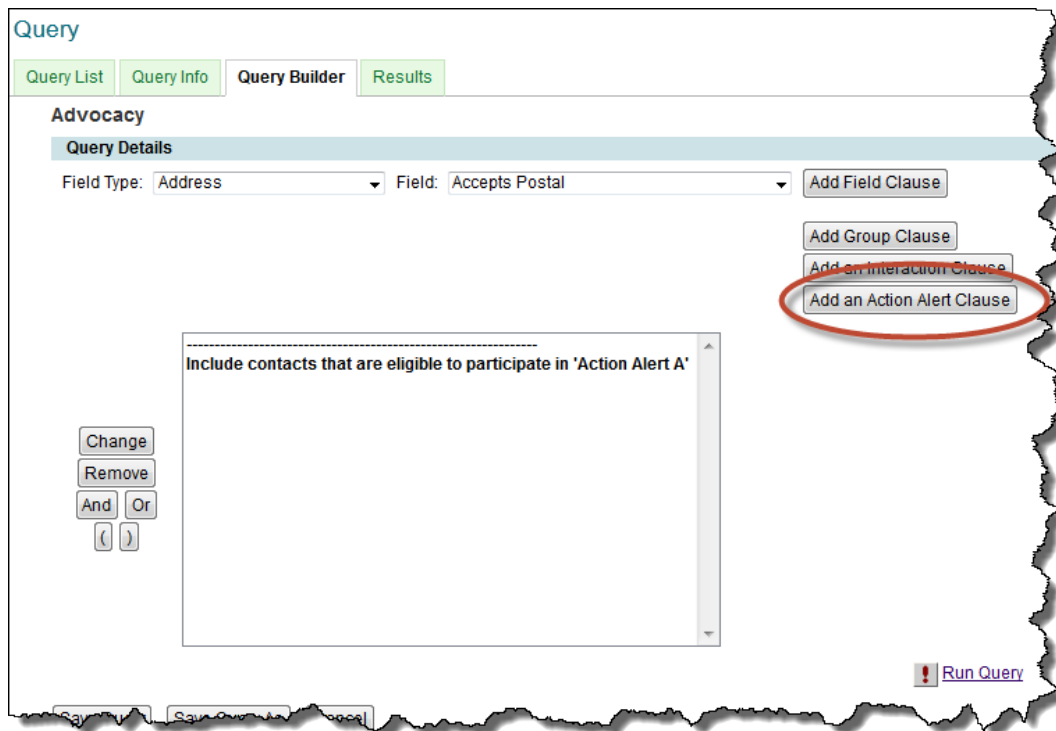
1. Manually select 75 members of Congress who they are targeting (that's 75 clicks).
2. Create a new query and click **Add Group Clause**.
3. Manually select **each** of the 75 congressional districts (for example, California District 1 AND Maryland

District 4 AND Texas District 8 and so on). It takes at least four clicks to add each district clause, meaning you have to click 300 times to add 75 districts.



The new query process:

1. Manually select 75 members of Congress who they are targeting (75 clicks).
2. Create a new query and click **Add an Action Alert Clause**.



3. Select an Action Alert and the clause containing all of the districts is added to the query (1 click).



Vote Center Updates

The Vote Center is now updated several times a day instead of once a day.

Donation Form Responsive Layout

You can now make your donation forms available for display on tablets and smart phones as well as the traditional web page on a personal computer. You must have an HTML 5 Page Wrapper available for the donation form.

All donation form elements remain the same as in standard forms, except the Standard Donation Element and the Payment Type Element, which have been updated for the Responsive layout.

The Standard Donation element in a Responsive layout does not include the column level layouts that can be configured because they are not necessary in the Responsive layout.

The Payment Type element in a Responsive layout is more compact and uses selection buttons instead of offering older-style drop-down menus for configuration, which were seldom used.

The Responsive option in the Form Layout is automatically available in Q1 2013.

Specifying Responsive as the Form Layout

When creating a new or editing an existing donation form in the Online Giving application, you can select the Responsive option from the Form Layout drop-down on the Identify Form page.

Donation Management

Online Giving
Donation Classic
Pending Contributions
Sustaining Gifts
Designated Giving
Membership Types
Donation Reports
General Configurations

[2011 Annual Fund Campaign](#) > 2011 Annual Fund

1. Identify Donation Form
2. Configure Donation Levels
3. Design Donor Screens
4. Validate
5. Configure Autoresponders
6. Test Drive
7. Publish

*** 1. Form Name:**
Identifies the purpose of this form to other administrators viewing donation form lists

2. Public Name:
This name will be displayed in the browser's title bar.

3. Description:
The form description is used internally for further identification.

*** 4. Security Category:**
The Security Category selected here will determine which administrators can manage this Donation Form and which end-users can see and contribute to this Donation Form.

5. Form Designee:
The form designee will assign all funds collected with this form to a specific designee. If you choose a designee here, the Designated Giving element will not be available for addition to the form.

6. Interaction Mode:
Specify whether the form is online-only, offline-only, or both online and offline.

7. Form Layout:
Specify whether the form will use the standard web page layout or responsive layout for mobile devices

8. Responsive Code:
Specify the default source code for this donation form. The code is added to the Profiles of constituents who use this donation form and who are not already identified by another source code.

9. Default SubSource Code:
Specify the default subsource code for this donation form. The code is added to the Profiles of constituents who use this donation form and who are not already identified by another subsource code.

or

Configuring the Responsive Standard Donation Level Element

When configuring the Standard Donation Level element in a Responsive layout, you no longer set up the column structure. The Responsive version has selection buttons laid out in a vertical column by default to accommodate the smart phone layouts instead of arranging the selection buttons in columns as done in the Standard layouts.

Donation Management

Online Giving | Donation Classic | Pending Contributions | Sustaining Gifts | Designated Giving | Membership Types | Donation Reports | General Configuration

Campaigns > Test Event 2010 Donation Campaign > ZTEST > Donation Form

1. Identify Donation Form
2. Configure Donation Levels
3. Design Donor Screens
 - a. Donation Form
4. Validate
5. Configure Autoresponders
6. Test Drive
7. Publish

The Form Designer shows the data elements that are already on your form in the window at the right; additional data elements that you can add are shown in the window at the left. Select a data element to Add, Remove, or Reorder it. Use the lower portion of the page to Edit and Preview a selected element after saving it. Use the Preview button to preview the entire form.

Select data elements to include in this form: Arrange the order of the selected data elements:

General Page Fields

- Page
- Section Header
- Buttons
- HTML Caption
- Transaction Summary

Giving Patterns & Premiums

- Flexible Sustainer Donation Level
- Forever Sustainer Donation Level

Page #1

- Standard Donation Level
- Section Header
- Billing Title
- Billing First Name
- Billing Middle Name
- Billing Last Name
- Billing Suffix
- Billing Street 1

Buttons: Add > < Remove

Buttons: New Edit Delete Save Order and Edit Selected

Previous Data Element | Standard Donation Level | Next Data Element

Edit Data Element | Preview Data Element

[? Help me with this Data Element](#)

1. Is this field visible on the Donation form?
Choose this option to allow the user to see and edit this field.
 Yes, this field is visible.

* **Field Label:**
Enter the label to identify this field to the user.
Enter A Gift Amount:

2. Level Layout:
Select one of the available layouts for the donation levels.
Single column

Yes, display Ask Messages for all levels simultaneously.

3. Level Setup:
If you would like to set up level-specific Ask Messages or recurring behavior, choose these options below. Otherwise, one Ask

The Level Layout (which aligns the donation levels in columns) is not available for Responsive Layouts.

Configuring the Responsive Payment Type Element

When configuring the Payment Type element in a Responsive layout, you just need to check the payment types you want to display instead of going through all of the configuration options that were not used in the Standard layout.

← [Previous Data Element](#) **Payment Type** [Next Data Element](#) →

Edit Data Element | Preview Data Element

- Credit Cards:**
If you would like to offer credit cards as a payment type, choose this option. If you allow the use of credit cards, you will need to configure some additional fields.
 Yes, allow donors to pay with a credit card.
- Bank Account Withdrawal:**
 Yes, allow donors to pay with a bank account withdrawal.
- Allow payment with PayPal:**
 Yes, allow donors to pay with PayPal.
- Allow payment with Amazon Payments:**
 Yes, allow donors to pay with Amazon Payments.
- Cash Payment:**
If you want to be able to record cash transactions, choose this option.
 Yes, allow administrators to record cash donations.
- Check Payment:**
If you want to be able to record check transactions, choose this option.
 Yes, allow administrators to record donations received via check.

The Help for these features will be available with the release of Q1 2013.

Events

This release introduces some major enhancements to Events. You can now group and report on event attendees based on how they answer registration questions and customize the event registration form fields. In addition, you can now make multiple copies of an event at one time, reorder ticket types on the registration page, and, finally, the layout of the registration page has been improved.

Add Any Constituent360 Field to Event Registration Forms

Previously, you could only add the **First Name**, **Last Name**, and **Email** fields to an event registration form - now you can add any Constituent360 field. The registration fields are linked to Constituent360 so if the attendee is new to your organization, a new Constituent360 record is made; if the registrant is an existing member, the fields are automatically populated.

Note: The Constituent360 fields that are available vary depending on how your site is configured.

A new option and a new editing page have been added that allow you to add additional fields to the registration form.

For more information, see the [Customize the Event Registration Page video](#) and the [Luminate Online help](#).

- **New Option: Select a Template**

You can now select either a **Standard** or a **Custom** template for an event registration form. If you select the **Standard** template, no further action is required. If you select the **Custom** template, the next step is to select the registration form fields. Click the **Configure Constituent Registration Information** editing page.

The screenshot displays the 'Configure Constituent Registration Information' page. At the top, there are tabs for 'Event Calendar' and 'Event List'. Below the tabs, the breadcrumb path is 'Run for Your Life 11/15/2012 > Identify Event'. A left-hand navigation menu lists 10 steps: 1. Identify Event, 2. Set Event Date, 3. Configure Additional Information, 4. Edit Ticket Information, 5. Customize Confirmation Message, 6. Configure Ticket Types, 7. Configure Constituent Registration Information, 8. Include Questions, 9. Customize Autoresponders, and 10. Publish. The main content area shows the following steps:

- 1. Event Name:** Identifies this event on the calendars and lists. Input field: Run for Your Life.
- 2. Security Category:** Controls who can view this event. Center Security Category: Center A.
- 3. Page Wrapper:** Controls the elements that will display in the margins on the event page. Options: Use the default Page Wrapper, Override the default Page Wrapper.
- 4. Registration Page Template:** Selects the layout of the event registration page. Options: Standard (includes First Name, Last Name, and Email), Custom (includes First Name, Last Name, and Email, and you can add additional Constituent profile fields).

At the bottom, there are 'Next' and 'Cancel' buttons.

- **New Editing Page: Configure Constituent Registration Information**

If you select the **Custom** template, a new page in the editing process displays, **Configure Constituent Registration Information**. Select the fields you want from the **Available Fields** column and move them to the **Displayed Fields** column. Within the **Displayed Fields** column, you can configure individual fields to be **Editable**, **Read Only**, or **Required**. You can drag the fields up and down to rearrange them and you can also click the **Heading** button to add a heading above a field or group of fields. For example, you might want to add the heading, Address, above the name, street address, and zip code fields.

Note: The **First Name**, **Last Name**, and **Email** fields are always required and cannot be removed from the list.

1. Identify Event
2. Set Event Date
3. Configure Additional Information
4. Edit Ticket Information
5. Customize Confirmation Message
6. Configure Ticket Types
7. Configure Constituent Registration Information
8. Include Questions
9. Customize Autoresponders
10. Publish

Select which fields to include on the event registration form. Fields in the Displayed Fields column will display on the registration form. Drag fields up and down in the Displayed Fields column to change their display order.

Available Fields

Expand all Collapse all

- ▼ Biographical Information
- User Name
- Reminder Hint
- ▶ Name
- ▶ Email
- ▼ Address
- Accept Mail
- ▼ Address
- County (Automatic)
- Country
- ▶ Phone

Displayed Fields

- First Name *Required*
- Last Name *Required*
- Email *Required*
- Address
- Street 1 *Required*
- Street 2 *Editable*
- City *Required*
- State/Province *Required*
- ZIP/Postal Code *Required*

or

Group Attendees by Registration Question Answers

You can now group event attendees based on how they answer questions on the registration page. This can help you to identify certain attendees that require further action. For example, you could ask attendees if they are interested in volunteering for your organization and create a filter that groups those who reply “Yes”. This new feature includes:

- A new editing page for defining group filters called , **Create Group by Event Question**.
- A new tab for managing filters called **Event Groups**.
- A new column in the **Event Attendees** report to list questions and responses by attendee.

For more information see the [Create Groups Based on Event Question Responses](#) video and the [Luminate Online help](#).

The New Create Group by Event Question Editing Page

When you click the **Include Questions** editing page, a new option, **Create Group by Event Question**, display at the bottom of the left-hand column. This page allows you to define the filters for a group. Name the group and select a question and the desired answer. You can add more than one filter to a group, but the attendees must match all the criteria to be included. The filters are listed at the bottom of the page.

1. Identify Event
2. Set Event Date
3. Configure Additional Information
4. Edit Ticket Information
5. Customize Confirmation Message
6. Configure Ticket Types
7. Configure Constituent Registration Information
8. Include Questions
 - a. Create Group by Event Question
9. Customize Autoresponders
10. Publish

Related Actions

- ▶ Create Group by Event Question

*** 1. Group Name**
Identify the group in the User Group List

2. Group Description
Describe the purpose of the group

*** 3 Event Question and Response Filter**
Configure each question and answer filter for grouping attendees

When is your birthday? ▼

Choose the desired response

Within a Range ▼ Dec ▼ 1 ▼ 1987 ▼ to Dec ▼ 1 ▼ 1989 ▼

Equal to

On or Before

On or After

Within a Range

Group Filters
Attendee responses must match all of the filters to be included in the group

When is your birthday? *is from 12/01/1987 to 12/01/1989* ⊘

What size t-shirt would you like? *includes S or M or L or XL* ⊘

or [Cancel](#)

The New Event Groups Tab

The new **Event Groups** tab is where you manage the filters for a single event (as opposed to all events). From this tab you can view the attendees, view the filters that define the group, delete the group, change group security settings, and so on.

Event Calendar	Event List	Attendees	Reports	Event Groups
Winter Festival				
<input type="button" value="Refresh Page"/>				
Records 1 - 2 of 2 First Previous Next Last				
<input type="text"/>		<input type="button" value="Search"/>		<input type="button" value="Show All"/>
		Page 1 of 1		<input type="button" value="To Page"/>
Group Name	Actions	Group Description	Modify User	Last Refresh Date/Time
Potential Teen Volunteers	Refresh Group View Filters Edit	Attendees between the ages of 16-18 who might like to volunteer for our teen program	Site Administrator	11/02/2012 13:07:23 CDT
T-shirt size	Refresh Group View Filters Edit	To know what size t-shirt to mail to the event attendees	Site Administrator	11/02/2012 13:09:28 CDT
Records 1 - 2 of 2 First Previous Next Last				

The New Event Attendees Report Column

A new column has been added to the **Event Attendees report** in Report Writer called **Survey Questions**. This adds a column for every event question and a row for every attendee and their answer to the report.

Miscellaneous Enhancements

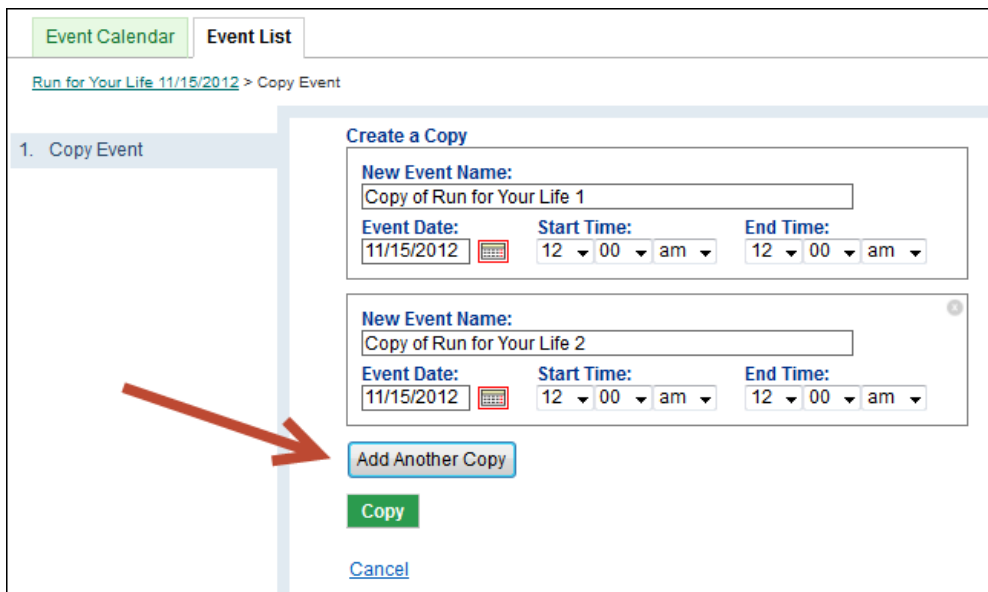
Some additional enhancements have also been made to the Events application including make multiple copies, reorder ticket types, and improved layout of the registration page.

For more information see the [Events Enhancements video](#).

- **Make multiple copies of events**

You can now make multiple copies of an event at one time instead of copying them one by one.

Note: This option is not available for Recurring, Multi-Day, or Multi-Part Events.



The screenshot shows a web interface for creating multiple copies of an event. At the top, there are tabs for 'Event Calendar' and 'Event List'. Below the tabs, the breadcrumb path is 'Run for Your Life 11/15/2012 > Copy Event'. The main content area is titled '1. Copy Event' and contains a 'Create a Copy' section. This section has two identical forms for creating copies. Each form has a 'New Event Name' field (e.g., 'Copy of Run for Your Life 1'), an 'Event Date' field (11/15/2012), and 'Start Time' and 'End Time' dropdown menus (12:00 am). Below the forms is a blue 'Add Another Copy' button, a green 'Copy' button, and a blue 'Cancel' link. A red arrow points to the 'Add Another Copy' button.

- **Reorder Ticket Types (Coming in Q2)**

Previously, ticket types only displayed on the registration page in order of price. You can now reorder the ticket types any way you like, such as in alphabetical order. New grip bars in the ticket type rows in the Configure Ticket Type editing page allow you to drag and rearrange the types.

Event Calendar | Event List

Run for Your Life 11/15/2012 > Configure Ticket Type

1. Identify Event
2. Set Event Date
3. Configure Additional Information
4. Edit Ticket Information
5. Customize Confirmation Message
- 6. Configure Ticket Types**
7. Configure Constituent Registration Information
8. Include Questions
9. Customize Autoresponders
10. Publish

This list shows the ticket types created for this event. Drag and drop rows to change the order displayed to the constituent.

Ticket Types Add Type

#	Name	Price	Inventory	Remaining	Actions
1	Gold Ticket	\$100.00	No Limit	No Limit	Edit Close Registration Delete
2	Silver Ticket	\$50.00	No Limit	No Limit	Edit Close Registration Delete
3	Bronze Ticket	\$25.00	No Limit	No Limit	Edit Close Registration Delete

Next or Cancel

- **Publish an Event, But Make it Private**

Previously, when you published an event, it displayed on the Constituent-facing calendar. Now you have the option to publish an event, but keep it private so that it does not display on the Constituent-facing calendar. Only attendees who have been sent the URL can access the registration page.

Event Calendar | Event List

Run for Your Life 11/15/2012 > Publish

1. Identify Event
2. Set Event Date
3. Configure Additional Information
4. Edit Ticket Information
5. Customize Confirmation Message
6. Configure Ticket Types
7. Configure Constituent Registration Information
8. Include Questions
9. Customize Autoresponders
- 10. Publish**

1. Event Status:
Determines whether the event is visible on Constituent Calendars

- Draft: Displays on the Admin Calendar only
- Published (Public): Displays on the Constituent Calendar
- Published (Private): Does not display on the Constituent Calendar, only invitees with the Event URL can view the event**

2. Event URL:
Copy and paste the Event URL in web pages and emails to direct people to the Event Details page.
http://qa208.bvt2.corp.convio.com/site/Calendar?id=100001&view=Detail

Finish Save or Cancel

- **Improved Registration Page Layout**

The layout of the registration page has been improved so that it is more pleasing and easier to locate items.

The old registration page layout:

RSVP for Marine Mammal Walkathon

* Name: First Last

* Email:

Yes, I would like to receive e-mail from Daredevil Test Site

Remember me. [What's this?](#)

Please specify the number of guests, including yourself, that will attend:

Would you like to receive an email reminder for this event?

Yes, email me a reminder

The new registration page layout:

Marine Mammal Walkathon

Date: Saturday, November 3, 2012
Time: 12:00 PM - 4:00 PM

* = Required Fields

Attendee Information

* First Name:

* Last Name:

* Email:

Address

Street 1:

Street 2:

City:

State/Province:

ZIP/Postal Code:

Please specify the number of guests, including yourself, that will attend:

HTML5 Page Wrappers

You can now make page wrappers with the HTML5 document type that make their associated pages (including donation forms) more stylable with CSS and responsive to the layout of the device on which they are viewed, such as smart phones and tablets.

The tableless designs allowed in HTML5 documents makes it much easier to customize your pages and style them to your business standards using your own CSS to determine where content elements display on your pages and what they look like. You can enter your custom div tags and style tags in CustomStyle.css provided in Page Wrapper Editor.

Page Wrapper Editor

Page Wrapper Editor > TRResponsive > Default

1. Name
2. Meta Tags
3. Body Tag Attributes
4. HTML Body
5. Printable Version
6. Publish Page Wrapper

1. Edit the HEAD element for your PageWrapper below:
Use this screen to customize the contents of the HTML HEAD element. The HEAD element contains header information about the document, such as its title, keywords, description, and style sheet. Content in the HEAD is not rendered, with the exception of the required TITLE element. Much of the content for the HEAD element will be automatically generated; this screen allows you to add to what is generated.

Document Type Declaration

Select a document type declaration.

HTML 5

Additional HTML Tags for HEAD Element

If you want to include SCRIPT elements for javascript or LINK elements, you can enter them here. The META keywords and description tags are generated from the keywords and description entered, but you can enter additional META tags here as well.
Any additional tags you enter should be valid HTML tags. For example:
<script language="JavaScript" src="../js/my_scriptfile.js" type="text/javascript" />

<meta name="viewport" content="width=device-width, initial-scale=1.0, maximum-scale=1.0;">

Enter the viewport statement here

Adding CSS Rules to Control Element Placement and Styling

To control the styling and element placement, you can also enter CSS rules in the Additional HTML Tags section in a <style> section. For example, you can insert div tags to define the various sections, like the header, the links typically found in the header or left navigation, and the login fields, and how the elements within the section display. A sample snippet of code is provided in the Page Wrapper Editor online help that you can use as a model for this CSS.

You can define the screen widths and which elements to display or hide on tablet and smart phone devices by inserting media statements in this Additional HTML Tags section. For example, you can code a snippet that hides the login fields on a smart phone by entering display:none for the login-fields div in the Smart Phone Layout definition.

```
<!-- Smart Phone Portrait Layout -->
@media only screen and (max-width: 767px) {
.mobile img#banner_image,
.mobile div.login-fields {
display: none;
}
.mobile div.nav-content {
float: none;
text-align: center;
}
.mobile ul.nav-links li {
width: 105px;
}
}
```

Samples of this code are also contained within the sample snippet available from the Page Wrapper Editor online help.

Adding the Mobile Class Statement

You should also enter a mobile class statement in the Body Tags section of the Body Tag Attributes page in Page Wrapper Editor (for example, class="[[?xtruex::x[[S80:mobile]]x::mobile::]]").

Page Wrapper Editor

Page Wrapper Editor > TRResponsive > Default

- Name
- Meta Tags
- Body Tag Attributes
- HTML Body
- Printable Version
- Publish Page Wrapper

1. Edit the BODY tag for your PageWrapper below:
Use this screen to customize the attributes of the HTML BODY tag.

Margin
The margin provides space between the edge of the browser and your page. The values entered are in pixels. Leave the margin blank and with a blank to omit these attributes.

Additional attributes for the BODY tag
If you want to include additional attributes for the BODY tag, you can enter them below. These should be expressed as name="value" pairs and will be embedded within the body tag.

class="[[?xtruex::x[[S80:mobile]]x::mobile::]]" ← Enter the mobile class statement here.

⋮

Adding HTML for the Elements that Display in the Page Wrapper

To style your header and content, you can enter the appropriate HTML on the HTML Body page. You can use S-Tags to bring in content dynamically as well as link to other site pages and provide personalization on the pages.

To create this:

LOGO

[Event Home](#)
[About Event](#)
[Contact Us](#)

Run For Life 2012

Donate:
[Click here to donate directly](#)

Find a Participant or Team:

The HTML code would look like this:

Page Wrapper Editor

Page Wrapper Editor > TRWrapperResponsive > Copy of Default

- Name
- Meta Tags
- Body Tag Attributes
- HTML Body
- Printable Version
- Publish Page Wrapper

1. Edit the HTML content for this Page Wrapper below:
Use this screen to edit the HTML content for the Page Wrapper. You must insert a Page Body Placeholder on your pages will appear within the Page Wrapper. The Page Body Placeholder tag can be inserted using the

-- Personalization -- -- Conditionals -- -- Components -- -- Links --

```
<div class="wrapper-header clearfix">
<div class="nav-content">
<div class="banner-logo">
  
</div>
<ul class="nav-links">
<li><a class="nav-link" href="#">Event Home</a></li>
<li><a class="nav-link" href="#">About Event</a></li>
<li><a class="nav-link" href="#">Contact Us</a></li>
</ul>
</div>
<div class="login-fields">
  <convio:session name="3" param="User_Responsive"></convio:session>
</div>
</div>
<div class="wrapper-body">
  <convio:session name="63" param="3"></convio:session>
</div>
```

Payment Capabilities

Site Administrators can use the new Luminate Online *Payment Capabilities* feature to import Blackbaud Merchant Services (BBMS) accounts into Luminate Online and manage their organization's merchant accounts in

Luminate Online.

Note: Contact your BlackbaudAccount Manager to assign access privileges to your organization's Site Administrator.

A *Payment Service* (such as BBMS, PayPal, Amazon, or ACH) provides funds transfer capability from your organization's Luminate Online Merchant Account to the respective service provider.

A *Merchant Account* allows your organization to accept donations, recurring gifts, pledges, eCommerce, or event ticket purchase transactions in Luminate and route them through the correct payment service. A Merchant Account is comprised of one or more gateways to payment services.

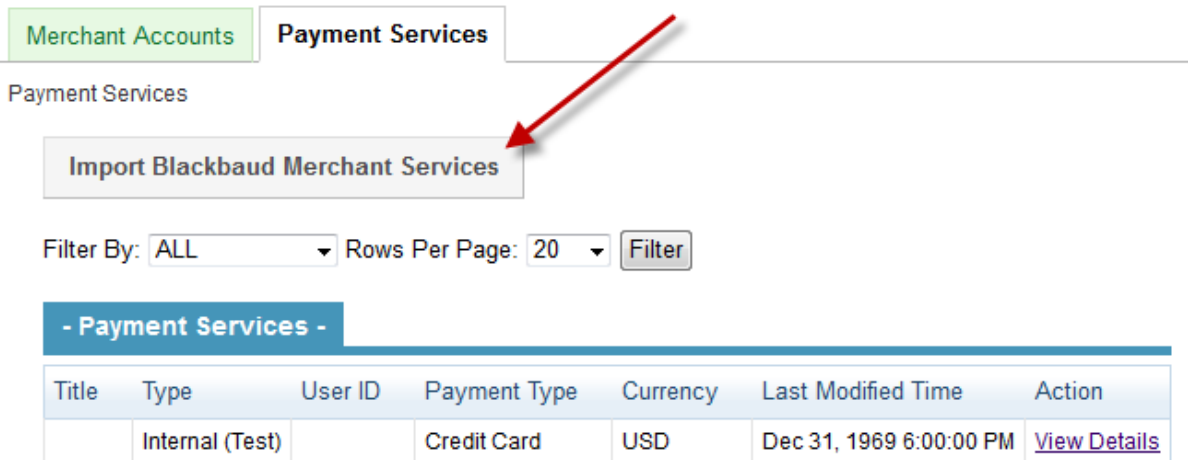
Importing Blackbaud Merchant Services Accounts

An organization sets up their Blackbaud Payment Service (BBPS) account and associated Blackbaud Merchant Services (BBMS) accounts outside of Luminate Online and then uses the Luminate Online Payment Capabilities feature to import the BBMS accounts and associate them with a Luminate Online Merchant Account.

To import the externally defined BBMS gateways from your organization's BBPS account, navigate to Luminate Online > **Setup** > **Payment Capabilities**.

For more information, see the [Payment Capabilities video](#).

Product Configuration



Merchant Accounts | **Payment Services**

Payment Services

Import Blackbaud Merchant Services

Filter By: ALL Rows Per Page: 20 Filter

| - Payment Services - | | | | | | |
|----------------------|-----------------|---------|--------------|----------|-------------------------|------------------------------|
| Title | Type | User ID | Payment Type | Currency | Last Modified Time | Action |
| | Internal (Test) | | Credit Card | USD | Dec 31, 1969 6:00:00 PM | View Details |

Click **Import Blackbaud Merchant Services**, log in to your BBPS account (not your BBMS account), and click **Import**. The Payment Services page lists the imported BBMS accounts associated with the BBPS account that use the currency supported on your site.

Note: If you make changes to the BBMS accounts outside of Luminate Online, you must reimport the changes into Luminate Online.

Setting up a Merchant Account

To set up a Merchant Account, which is comprised of one or more Luminate gateways to payment services such as BBMS or PayPal, navigate to Luminate Online > **Setup** > **Payment Capabilities** and click **Create Account** on the **Merchant Accounts** tab.

For more information, see the [Payment Capabilities video](#).

Product Configuration

Merchant Accounts **Payment Services**

Merchant Accounts

[Create Account](#)

Payment Processing is LIVE on this site.

Manage your organization's merchant accounts and payment services.

- Merchant Accounts -

| Account Name | Sustainer | Title | Payment Service | User ID | Currency | Card Types | Action |
|-----------------------------|-----------|-------|-----------------|---------|----------|--|----------------------|
| Default Merchant Account | ✓ | | Internal (Test) | | USD | Visa, MasterCard, American Express, Discover | Edit |
| Blackbaud Merchant Services | ✓ | | Internal (Test) | | USD | Visa, MasterCard, American Express, Discover | Edit |

Complete the Merchant Account setup on the Account Details and Merchant Detail pages.

Note: To add a BBMS gateway to your Luminate Online Merchant Account, select the BBMS credit card account that you imported from BBPS.

Product Configuration

Merchant Accounts **Payment Services**

[Merchant Accounts](#) > [Create Account](#)

Account Details

Merchant Detail

Related Actions

Payment Services

*** 1. Merchant Account Name:**

Enter a name that will be used by site administrators to identify this merchant account.

*** 2. Security Category**

Security Category determines which administrators will have access to this Merchant Account

Note: This question updates the Interests for all users who take the survey, even if the selected Security Level does not allow the

General

3. Tax ID:

Enter the tax ID below for this merchant account. If no value is entered, transactions through this account will use the site-level d

4. Credit Card Account:

Select a gateway account to use for credit card transactions.

No Gateway Selected

5. Bank (ACH) Account:

Select a gateway account for Bank (ACH) transactions.

No Gateway Selected

6. Amazon Payments Account:

Select a gateway account to use for Amazon Payments transactions.

No Gateway Selected

7. PayPal Account:

Select a gateway account to use for PayPal transactions.

No Gateway Selected

[Next](#) [Save](#) or [Cancel](#)

PDF Receipt Batching

A new recurring task is available to batch custom PDF receipts from a specific week into a ZIP file on the exchange/common FTP site that you can download to store on-site at your place of business.

You must request that Convio Care or your Account Success Manager enable the Batch Receipts Recurring Task in the Tasks list.

Note: Only custom PDF receipts are batched.

By default, this task runs every Monday through Sunday to batch up the new receipts or those that have been modified. You can work with Convio Care to set a different time schedule with the PAYMENT_BATCH_RECEIPT_TASK_DATE site option.

The ZIP file is accompanied by a CSV file that lists the details for each receipt in the batch, such as the name of the constituent, the valued transaction, and date of the transaction.

If you lose a ZIP file or it is corrupted, you can request Convio Care to generate the ZIP file again as a one-time task.

Queue Problem Management

Use the new Search feature on the Luminate Online Queue Problem Management tab to view the queue synchronization error totals by type (that is, Contacts, Fundraising, Events, and Other). The Search page shows the total error count and how many errors originated in Luminate Online or Luminate CRM.

To use the Search feature, navigate to Luminate Online > **Data Management** > **Luminate Management** > **Queue Problem Management**.

Luminate Administration

The screenshot displays the 'Queue Problem Management' interface. At the top, there are navigation tabs: Queue Activity, Control Status, Queue Status, Queue Problem Management (selected), Problem Exports, and Auto Alerts. Below the tabs, a search bar is visible. The main content area shows error counts for four categories: Total (41 Errors), Online to CRM (25 Errors), CRM to Online (16 Errors), and Other (4 Errors). Each category is represented by a card with a 'View' button. The 'Contacts' card shows 23 total errors, with 7 from Online to CRM and 16 from CRM to Online. The 'Fundraising' card shows 9 total errors, with 9 from Online to CRM and 0 from CRM to Online. The 'Events' card shows 5 total errors, with 5 from Online to CRM and 0 from CRM to Online. The 'Other' card shows 4 total errors, with 4 from Online to CRM and 0 from CRM to Online.


| Category | Total Errors | Online to CRM | CRM to Online |
|-------------|--------------|---------------|---------------|
| Total | 41 | 7 | 16 |
| Contacts | 23 | 7 | 16 |
| Fundraising | 9 | 9 | 0 |
| Events | 5 | 5 | 0 |
| Other | 4 | 4 | 0 |

Click **View** to look at errors that occurred when data moved from Luminate Online to Luminate CRM or from Luminate CRM to Luminate Online.

Luminate Administration

Queue Activity Control Status Queue Status Queue Problem Management Problem Exports Auto Alerts

Queue Problem Management > Browse Contacts, Online to CRM

Search  Problem types: 1

<<< Previous 1 - 1 Next >

Contacts | Online → CRM


LoginException 7 Problems

Click the error category link to view all problems in the category.

Luminate Administration

Queue Activity Control Status Queue Status Queue Problem Management Problem Exports Auto Alerts

Queue Problem Management > Browse Contacts, Online to CRM > Search Results

+ (ERROR_NAME:"LoginException")  Problems found: 7 Delete All Export All Requeue All Rebuild All

<<< Previous 1 - 7 Next >

Results per page: 10

Filter by Origin:

CRM → Online

Online → CRM 7 Problems

Filter by Type:

Contacts 7 Problems

Fundraising

Events

Other

Contacts

LoginException
CONTACTS
Contact: Online → CRM
INVALID_LOGIN: Invalid username, password, security token; or user locked out.
Username=blah@convio.com

LoginException
CONTACTS
Contact: Online → CRM
INVALID_LOGIN: Invalid username, password, security token; or user locked out.
Username=blah@convio.com

LoginException
CONTACTS
Contact: Online → CRM
INVALID_LOGIN: Invalid username, password, security token; or user locked out.
Username=blah@convio.com

LoginException
CONTACTS
Contact: Online → CRM
INVALID_LOGIN: Invalid username, password, security token; or user locked out.
Username=blah@convio.com

Type a keyword in the Search box and click  to find a particular type of error.

Queue Activity | Control Status | Queue Status | **Queue Problem Management** | Problem Exports | Auto Alerts

Queue Problem Management > Search for "locked"

locked Problems found: 23 Delete All Export All Requeue All Rebuild All

<< Previous 1 - 10 Next >

Results per page: 10

Filter by Origin:

- CRM → Online (7 Problems)
- Online → CRM (16 Problems)

Filter by Type:

- Contacts (14 Problems)
- Fundraising (4 Problems)
- Events (5 Problems)
- Other (0 Problems)

Contacts

LoginException
CONTACTS
Contact: Online → CRM
INVALID_LOGIN: Invalid username, password, security token; or user **locked** out.
Username=blah@convio.com

LoginException
CONTACTS
Contact: Online → CRM
INVALID_LOGIN: Invalid username, password, security token; or user **locked** out.
Username=blah@convio.com

LoginException
CONTACTS
Contact: Online → CRM
INVALID_LOGIN: Invalid username, password, security token; or user **locked** out.
Username=blah@convio.com

LoginException
CONTACTS
Contact: Online → CRM
INVALID_LOGIN: Invalid username, password, security token; or user **locked** out.
Username=blah@convio.com

Click an error link and then click **Log** to view the message log.

Luminate Administration

Queue Activity | Control Status | Queue Status | **Queue Problem Management** | Problem Exports | Auto Alerts

Queue Problem Management > Search for "locked" > Problem Details

Delete Requeue Rebuild

LoginException [View Related Errors](#)

Contacts | Online → CRM | Contact
CRM ID: Unknown Online ID: 1001623

Log XML Message

Type: MSG_FATAL_ERROR
Date: 2012-11-08T10:32:22-06:00
Summary: LoginException
Detail:
INVALID_LOGIN: Invalid username, password, security token; or user locked out. Username=blah@convio.com

Click the **XML Message** tab to view the XML message contents.

Luminate Administration

Queue Activity | Control Status | Queue Status | **Queue Problem Management** | Problem Exports | Auto Alerts

Queue Problem Management > Search for "locked" > Problem Details

Delete Requeue Rebuild

LoginException [View Related Errors](#)

Contacts | Online ➔ CRM | Contact
 CRM ID: Unknown | Online ID: 1001623

Log XML Message

```

<?xml version="1.0" encoding="UTF-8"?><urn2:Message xmlns:urn2="urn:message.data.convio.com" xmlns:urn="urn:soap."
  <urn2:Version>1.0</urn2:Version>
  <urn2:ObjectType>contact</urn2:ObjectType>
  <urn2:Action>UPSERT</urn2:Action>
  <urn2:Origin>
    <urn2:System>Online</urn2:System>
    <urn2:Version>10.0.0.27092</urn2:Version>
  </urn2:Origin>
  <urn2:UniversalId>
    <urn2:Id xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:nil="true"/>
    <urn2:Version xmlns:xsi="http://www.w3.org/2001/XMLSchema-instance" xsi:nil="true"/>
  </urn2:UniversalId>
  <urn2:LocalId>
    <urn2:Id>1001623</urn2:Id>
    <urn2:Version>4</urn2:Version>
  </urn2:LocalId>
  <urn2:Data>
    <urn2:Field name="LastName">SB_Event_Error_Part_Last_C</urn2:Field>
  </urn2:Data>
  </urn2:Message>
  
```

Click the **Browse**, **Requeue All**, **Rebuild All**, **Delete All**, or **Export** action buttons to requeue or delete messages or to export an error message report.

Refer to the *Managing the Luminate Data Flow* Luminate OnlineHelp topic for more information.

TeamRaiser

Several enhancements were made to improve the participant experience as well as provide administrative support for some mission-critical tasks.

Participants can register for a TeamRaiser event from their smart phones and tablets when the event is configured with an HTML5 page wrapper, Responsive donation form, Responsive page layouts, and Donations2 Transaction Processing (an advanced event option). The Login information can be displayed earlier in the registration flow to get to existing constituent information quickly, including the team they participated on in the previous event if they are a returning participant.

Participants can also switch to another team, register as an individual after they are already registered with a team, or join a team after they have registered as an individual using the new options in their Participant Center.

Event Administrators can:

- Easily add new questions, or modify existing ones, in their Blueprint TeamRaisers and push them down to child events created from the Blueprint.
- Confirm gifts in batches using the Gifts Upload process to match the IDs of gifts that were recorded but are in the Unconfirmed payment status.
- Update important constituent information in participant profiles using the Survey Question Response Upload process instead of manually processing changes or additions to the responses on their registration forms, which is useful for prize requests.
- Communicate with each other about a team by recording notes directly in the team records.

The Help for these new features will be available in Luminate Online Q1 2013.

Blueprint Question Revisions

You can now add more questions to a Blueprint TeamRaiser and select to push the new question down to all children TeamRaiser events that have been created from the Blueprint.

The Question Edit page has been updated to show the Question Type and Sort Order in a new Question Settings area at the top of the page instead of displaying them as Steps 1 and 2 without being able to edit them. The Availability field now displays as Step 1 for you to make the question available to any child events that have already been created from the Blueprint TeamRaiser.

When you add the new question, you can specify where to place it in the list of questions. If the local event administrator has added questions, it is important to note that your question may be interleaved between their local questions. Refer to the Blueprint TeamRaiser online help topic for details about sort ordering.

Note that even when you select to push the question to the child events, the pushed changes are scheduled to run in a Push Changes background task (often scheduled for off-peak hours) and are not immediately available until the task runs.

The new Availability options and Settings panel are automatically available when the Blueprint Locking site option is enabled on a site in Luminate Online Q1 2013.

Blueprint TeamRaiser questions lists are available for general event registration questions from the Related Actions on the Select Event Options page, Team Captain questions from the Related Actions on the Select Team Options page, and specific types of participation in the flow for editing or creating the Participation Type.

When creating a new question or editing an existing question from a Questions list, the Edit Question page displays with the new Settings section at the top of the page and the Availability options as Step 1 of the edit process.

The screenshot displays the 'Edit a Survey Question' interface. At the top, there are tabs for 'TeamRaiser List', 'Cross-Event Teams', 'Registration Upsells', 'Uploads', and 'Participant Centers'. Below the tabs is a breadcrumb trail: 'TeamRaiser Blueprints List > TESTBP TR > Edit Event Questions > Edit a Survey Question'. On the left, a vertical navigation menu lists steps: 1. Identify TeamRaiser, 2. Select Fundraising Options, 3. Select Event Options (with sub-step 'a. Select Questions'), 4. Select Team Options, 5. Associate Upsells, and 6. Manage Participation Types. The main content area is titled 'Question Settings' and shows 'Question Type : Text Value' and 'Order in List : 4'. A new section, '* 1. Availability', is highlighted with a red border and contains two radio button options: 'Include this question in new events created for this blueprint.' (selected) and 'Include this question in all existing and new events created from this blueprint.'. Below this is '* 2. Question Text:'. Two yellow callout boxes are present: one pointing to the 'Question Settings' header and another pointing to the 'Availability' options.

Bring Back Team Prompt For Returning Participants

You can display a prompt to returning participants who are logged in that asks if they want to bring back their team from the previous event to speed up their registration process.

[About Us](#)
[Contact Us](#)

Run Austin 2013

1 2 3 4 5

Join or Form a Team

Would you like to bring this team back?

TeamThree

* Team Name:

Team Fundraising Goal:

[I would like to join an existing team](#)

[I would like to participate as an individual](#)

The Bring Back Team prompt is automatically available when the Returning Teams Advanced Event Options are enabled and the TeamRaiser event is linked to a previous event in which the registrant participated on a site in Luminate Online Q1 2013.

When the TeamRaiser event is linked with a previous event (on the Identify TeamRaiser page, to configure the Returning Team Advanced Options:

1. From the TeamRaisers list, click **Edit** from the **Actions** column of the appropriate TeamRaiser event.
2. On the Identify TeamRaiser page, click **Select Event Options**.
3. From the Related Actions on the Select Event Options page, click **Edit Advanced Event Options**.
4. From the tasks along the left on the Define Advanced Fundraising Options page, click **Define Returning Teams Options**.
5. On the Define Returning Teams Options page, click the **Yes** checkbox to display all of the appropriate options.
6. For **Forming a Team**, click either **Anyone** option to allow returning participants to bring back the team they participated on (or that they admired, if selecting the second Anyone option). Selecting to only let a team captain bring back their team may be less effective if people have to wait to register until the captain registers.
7. For **Returning Teams Captain Role**, optionally click the first option to let people come back to their team

but not register as a captain.

8. When you are finished selecting these options, click **Save**.

Company Gifts Recorded as Unconfirmed or Confirmed

You can now enter gifts given to your event from local companies and mark the payment status as Unconfirmed if you do not have the payment in hand or Confirmed if it has been received. You can also edit existing gifts to enter the Payment Status.

The new Payment Status options on the Identify Gift page are available when the COMPANY GIFTS CONFIRMABLE site option is set to TRUE on a site in Luminate OnlineQ1 2013. Contact Client Care or your Client Success Manager to enable this new option.

To work with company gifts:

1. From the TeamRaisers list, click **Manage** from the **Actions** column of the appropriate TeamRaiser event.
2. On the Find Participant page, click the **Local Companies** tab.
3. On the Local Companies list page, click **Manage Company** from the **Actions** column of the appropriate company.

Click either:

- **Add a New Gift** from the Related Actions page and enter all the details, including selecting Confirmed or Unconfirmed as the **Payment Status**.
- **Edit** from the **Actions** column of the appropriate gift and click the appropriate **Payment Status**

option.

The screenshot shows a web interface for adding a new gift. At the top, there are navigation tabs: TeamRaiser List, Participants, Teams, Local Companies (selected), Unconfirmed Gifts, Event Gifts, Coaching Emails, and Library. Below the tabs is a breadcrumb trail: Testing Event > ABC Moving > Add New Gift. The main form area is titled '1. Identify Gift Details' and contains the following sections:

- 1. Gift Category:** Identifies the type of gift received. Includes a dropdown menu.
- * 2. Gift Amount:** Defines the monetary amount of the gift (Note: To keep this amount from displaying in the fundraising then the previous page to remove it.) Includes a text input field.
- 3. Notes:** Displays helpful detail about this gift in the Notes column of the Company Gifts lists viewable by Company Event Administrators that they may need to know. Includes a text input field.
- 4. Batch ID:** Groups this gift with a batch of offline gifts being processed at the same time. Includes a text input field.
- 5. Payment Method:** Determines the method by which the gift will be paid or recurring payments will be collected (selecting an fields to display). Includes radio buttons for **Cash** and **Check**.
- 6. Payment Status:** Determines if you have received the payment (that is, you have the cash or check in-hand). Includes radio buttons for **Confirmed** and **Unconfirmed**. This section is highlighted with a red box.

At the bottom of the form, there are buttons for **Finish** and [Cancel](#).

- When you are finished selecting these options, click **Save**.

Gift Confirmation via Gift Uploads

You can now use a gift upload file process to change the Payment Status of gifts recorded in multiple donor profiles from Unconfirmed to Confirmed when the payments have been received instead of manually performing the process in each individual profile or creating new duplicate gift entries.

To change the payment status in the profile from Unconfirmed to Confirmed, the gift record in the upload file must match an existing gift from the same donor for the same amount and date or the Gift ID.

The new Gift Confirmation field is automatically available when Uploads are allowed on the site in Luminate Online Q1 2013.

To work with this option:

- From the TeamRaisers list page, click the **Uploads** tab.
- From the Related Actions on the Uploads page, click **Gift Uploads**.
- On the Configure Parameters page, click the **Yes** checkbox for **Gift Confirmation**.

TeamRaiser List Cross-Event Teams Registration Upsells **Uploads** Participant Centers

Uploads > Upload Gifts

1. Configure Parameters
2. Upload File

Related Actions
▶ Define Required Fields

* 1. **Upload Name:**
Identifies this Upload operation on the Upload List (Note: Consider describing the content, such as RegistrationPriorTo081809)

2. **Test Mode Only:**
Enables you to check your data for errors before creating or changing constituent information with it
 Yes, only check the data for errors without processing it

3. **New Contact Record Creation Allowed:**
Determines whether to create a new constituent contact record for a donor in this Upload if a match to an existing constituent record is not found
 Yes, allow creation of new contact records from this Upload

4. **Event Gifts Allowed:**
Determines whether a gift given directly to the event (that is, no participant or team is specified) in this Upload is added as a gift or results in an error
 Yes, process an event gift in this Upload

5. **Relaxed Duplicate Checking Enabled:**
Determines whether to process a gift in this Upload that matches an existing gift from the same donor recorded on the same date and for the same amount to the same participant, team, or the event (Note: Enable this only if necessary to avoid processing errors.)
 Yes, process gifts from this Upload that may be duplicates

6. **Gift Confirmation:**
Determines whether to change the status from Unconfirmed to Confirmed for a gift from this Upload that matches an existing gift from the same donor for the same amount and date or the Gift Id (instead of creating a new gift)
 Yes, confirm gifts from this Upload that match existing unconfirmed gifts

7. **Address Matching Criteria:**

The new field for changing Gift Status from Unconfirmed to Configured

Login Page at Front of the Registration Flow

You can now move the Login page for returning constituent to the front of the registration flow instead of displaying it in the third step of the process. In addition to identifying your constituents and automatically completing their information earlier, the need to place a Login component in the Page Wrapper for mobile devices, like smart phones, will no longer be necessary.

The Returning User Login Page Location option is automatically available in the Advanced Event Options in Luminate Online Q1 2013.

When editing the configuration of a TeamRaiser event, to select this option:

1. From the TeamRaisers list, click **Edit** from the **Actions** column of the appropriate TeamRaiser event.
2. On the Identify TeamRaiser page, click **Select Event Options**.
3. From the Related Actions on the Select Event Options page, click **Define Advanced Event Options**.
4. From the tasks along the left of the Define Advanced Fundraising Options page, click **Define Event Options**.
5. On the Advanced Event Options page, locate the Returning User Login Page Location task (near the middle of the page) and click **First Step**.

The screenshot shows the 'TeamRaiser List' configuration page for 'Run For Life 2012'. The navigation tabs include 'Cross-Event Teams', 'Registration Upsells', 'Uploads', and 'Participant Centers'. The breadcrumb trail is 'TeamRaiser List > Run For Life 2012 > Edit Advanced Options'. A left-hand menu lists configuration steps: 1. Identify TeamRaiser, 2. Select Fundraising Options, 3. Select Event Options (with sub-steps a, b, c, d), and 4. Define Misc Options. The main content area shows step 1: 'Next Step Section Displays On All Pages in the Participant Center:' with a description. Step 16, 'Returning User Login Page Location:', is highlighted with a red box and includes a description and three radio button options: 'First step' (selected), 'Third step', and 'Disabled'. A partially visible description for step 17 is also shown at the bottom.

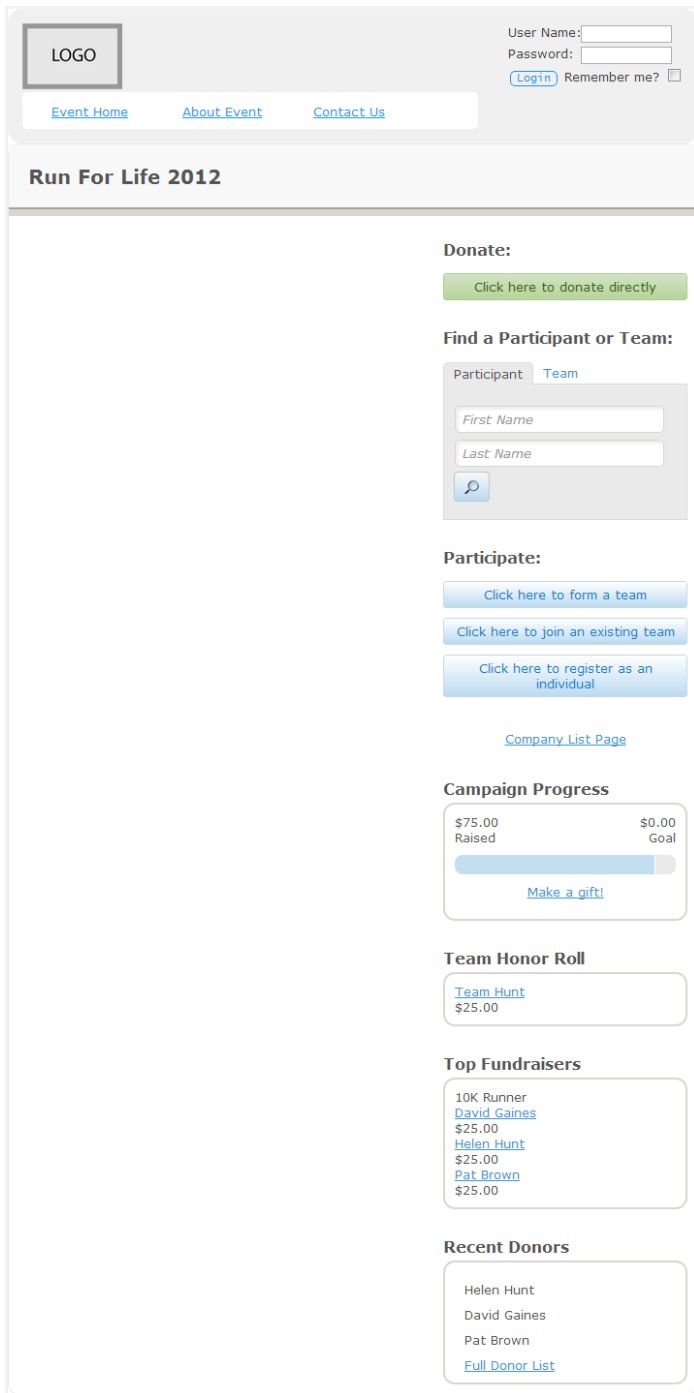
Responsive Layouts for Greeting and Search Pages

You can now change the Layout for the TeamRaiser Greeting and Search pages to make them responsive to the device on which they are being viewed. This completes the work to make TeamRaiser event registration pages available on a tablet or smart phone. For more information, see the [Optimize TeamRaiser Registration for Mobile Devices](#) video.

The Responsive option in the Layout drop-down menu when configuring these pages is available automatically in Luminate Online Q1 2013.

Configuring the Responsive Layout for the Greeting Page

The Responsive layout for the Greeting page enables you to customize and style your page. The default Greeting page has been updated and provides certain component arrangements that may display only on the larger device layouts, like your typical Web page on your personal computer or a tablet (shown below).



For example, you can specify to hide the Login component on a smart phone.

To configure the Greeting page with the Responsive layout:

1. From the TeamRaisers list, click **Edit** from the **Actions** column of the appropriate TeamRaiser event.
2. From the tasks along the left of the Identify TeamRaiser Details page, click **Customize Pages**.
3. In the TeamRaisers pages list, click **Configure** from the **Actions** column of the Greeting Page.
4. On the edit page, click **Responsive** from the **Layout** drop-down and then click **Finish** (at the bottom of the

page).

The screenshot shows the 'TeamRaiser List' configuration interface. At the top, there are tabs for 'Cross-Event Teams', 'Registration Upsells', 'Uploads', and 'Participant Centers'. Below the tabs, the breadcrumb path is 'TeamRaiser List > Testing Event > Greeting'. On the left, a sidebar lists 12 steps for configuring the page, with '12. Customize Pages' and its sub-item 'a. TeamRaiser Pages' highlighted. The main content area is titled '* 1. Custom Page Title and Content: Identifies this page and defines content to be displayed'. A dropdown menu for 'Layout:' is open, showing options like 'Customizable', 'Narrow Banner/Buttons Right', 'Narrow Banner/Buttons Top', 'Narrow Banner/Buttons Bottom', 'Wide Banner/Buttons Right', 'Wide Banner/Buttons Top', 'Wide Banner/Buttons Bottom', 'Buttons Top/No Status Indicators', 'Buttons Bottom/No Status Indicators', 'No Buttons/No Status Indicators', 'Narrow Banner/Buttons with Text Right', 'Wide Banner/Buttons with Text Right', and 'Customizable'. The 'Responsive' option is selected and highlighted in blue. Below the dropdown, there are form fields for 'Event Coordinator Name', 'Event Coordinator Phone', 'Event Coordinator Email', 'Sponsor name or image filename (1)', and 'Sponsor name or image filename (2)'. A 'Refresh' button is also visible.

- Back on the TeamRaiser Pages list, click **Configure** from the **Actions** column of the Find Participant page and repeat the step above.

Configuring the Responsive Layout for the Search Pages

The Search pages for locating a participant or a team have been updated when in the Responsive layout. Enhanced for a more modern look, the default Participant Search displays with two simple fields.



[Event Home](#)
[About Event](#)
[Contact Us](#)

Run For Life 2012

Donate:
[Click here to donate directly](#)

Find a Participant or Team:
Participant [Team](#)


 

Clicking the Magnifying Glass icon expands the fields available for a participant search.


Search For a Participant

To perform a search, enter your criteria below.

Search for a participant [Search for a team](#)



[Basic Search](#)

Event:
 

Search Results
Records 1 - 3 of 3
[Previous](#) | [Next](#)

[Brown, Pat](#)
Team Name:
[TeamBrown](#)

[Gaines, David](#)
Team Name:
[Team Gaines](#)

You can click the Team tab to search for a specific team.

LOGO

[Event Home](#)
[About Event](#)
[Contact Us](#)

Run For Life 2012

Donate:

[Click here to donate directly](#)

Find a Participant or Team:

Participant **Team**

And you can expand the Team search options by clicking the Magnifying Glass icon.

Search For a Participant

To perform a search, enter your criteria below.

Search for a participant

[Basic Search](#)

Search Results
Records 1 - 3 of 3
[Previous](#) | [Next](#)

[Brown, Pat](#)
Team Name:
[TeamBrown](#)

[Gaines, David](#)
Team Name:
[Team Gaines](#)

To configure the search pages with the Responsive layout:

1. From the TeamRaisers list, click **Edit** from the **Actions** column of the appropriate TeamRaiser event.
2. From the tasks along the left of the Identify TeamRaiser Details page, click **Customize Pages**.
3. In the TeamRaisers pages list, click **Configure** from the **Actions** column of the Find Participant Page.
4. On the edit page, click **Responsive** from the **Layout** drop-down and then click **Finish** (at the bottom of the page).

Configuring a Responsive TeamRaiser Registration Layout

You can now provide a TeamRaiser registration process that enables your participants to register for a TeamRaiser event on their personal computer, tablet, or smart phone.

You must:

- Create an HTML 5 Page Wrapper (or convert an existing one to use the HTML 5.0 document declaration) and apply appropriate mobile device statements and CSS. For details, refer to the section in this document about [HTML 5 Page Wrappers](#), Page Wrappor access the product online help topic by clicking the Help link at the top of a Page Wrapper Editor page.
- Create a donation form that uses the Responsive layout (or convert an existing one). For details, refer to section in this document about Responsive Donation Forms. (The product online help topic will be available when Luminate Online Q1 2013 is released.)
- Configure the following TeamRaiser pages to use the Responsive layout:
 - Greeting
 - Find a Participant
 - Team Selection
 - Team Password
 - Participation Options
 - Returning Participant Login
 - Registration Information
 - Secondary Registration Information
 - Waiver
 - Registration Summary
 - Thank You

Participant Information Updates via Response Uploads

You can now update participant profiles with new values for question responses asked on the registration pages of a TeamRaiser event using an upload file. The value in the upload file will replace the existing value in the profile or fill in the field if it is blank. If the response column is left blank in the upload file but a value exists in the profile, the profile value will be replaced with the blank.

The Overwrite Mode option is automatically available when Uploads are allowed on a site in Luminate Online Q1 2013.

To work with the Overwrite Mode option:

1. From the TeamRaisers list page, click the **Uploads** tab.
2. From the Related Actions on the Uploads page, click **Upload Survey Responses**.
3. On the Configure Parameters page, click the **Yes** checkbox for **Overwrite Mode** and then click **Next**.

TeamRaiser List Cross-Event Teams Registration Upsells **Uploads** Participant Centers

Uploads > Upload Survey Responses

1. Configure Parameters
2. Upload File

*** 1. Upload Name:**
Identifies this Upload operation on the Upload List (Note: Consider describing the content, such as RegistrationPriorTo081809)
Response Updates 11/16

2. Test Mode Only:
Enables you to check your data for errors before creating or changing constituent information with it
 Yes, only check the data for errors without processing it

3. Overwrite Mode:
Replaces existing survey responses in participant records with the values in this upload file
 Yes, overwrite existing survey responses

Next or **Cancel**

The new Overwrite Mode for question response uploads.

Team Notes

To help facilitate communication between your event administrators about teams participating in a TeamRaiser event, you can enter notes about the team on their Team record for other event administrators to read. A Note icon displays next to a team that has notes recorded in the list of teams. The notes about a team can also be printed.

The Team Notes feature is automatically available on the Team Record in Luminate Online Q1 2013.

You can:

- [Create a team note on the record of a specific team](#)
- [Identify a team with notes from the Teams list](#)
- [Read the notes about a team](#)
- [Print out the notes about a team](#)

Creating a Team Note

► To create a note on the record of a specific team:

1. From the TeamRaisers list, click **Manage** from the **Actions** column of the TeamRaiser event.
2. On the Find Participant page, click the **Teams** tab.
3. On the Teams list page, click **Manage** from the **Actions** column of the appropriate team.
4. On the Team Details page, click the **Notes** tab.

TeamRaiser List | Participants | **Teams** | Local Companies | Unconfirmed Gifts | Event Gifts | Coaching Emails | Library

Run For Life 2011 > TeamBrown

Related Actions

- ▶ Edit Team Details
- ▶ Edit Team Page
- ▶ Record Team Donation
- ▶ Set Batch ID

[Refresh this page](#)

This is a summary that shows the information about the Gifts and Members of the selected team. Click Record Team Donation to enter a donation made on behalf of the team. In the Gifts list, use the View/Edit action to see information about the donor, edit the name to display on the Team Gift List, and change the amount of an unconfirmed cash or check gift. Use the Members tab to see the team roster and work with the TeamRaiser profiles of the members. Use the Notes tab to record and view notes about the team.

TeamBrown (ID: 1040)

Captain:
Pat Brown
 11011 Domain Drive
 Apt 8102
 Austin, TX 78758-7764
 devnull+pb@convio.com

Active Members: 1
Team Goal: None
Confirmed Gifts: \$25.00
Total Gifts: \$25.00

Gifts | **Members** | **Notes** | [New tab for Team Notes](#)

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Page 1 of 1

| Name | Action | Gift Type | Gift Date | Amount | On Behalf of |
|-----------|---------------------------|--------------------------|------------|---------|--------------|
| Pat Brown | View/Edit | Offline Confirmed (Cash) | 11/21/2012 | \$25.00 | Pat Brown |

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

5. From the Related Actions on the Notes page, click **Create a Team Note**.

TeamRaiser List | Participants | **Teams** | Local Companies | Unconfirmed Gifts | Event Gifts | Coaching Emails | Library

Run For Life 2011 > TeamBrown

Related Actions

- ▶ **Create a Team Note**
- ▶ Print the Notes

This is a summary that shows the information about the Gifts and Members of the selected team. Click Record Team Donation to enter a donation made on behalf of the team. In the Gifts list, use the View/Edit action to see information about the donor, edit the name to display on the Team Gift List, and change the amount of an unconfirmed cash or check gift. Use the Members tab to see the team roster and work with the TeamRaiser profiles of the members. Use the Notes tab to record and view notes about the team.

TeamBrown (ID: 1040)

Captain:
Pat Brown
 11011 Domain Drive
 Apt 8102
 Austin, TX 78758-7764
 devnull+pb@convio.com

Active Members: 1
Team Goal: None
Confirmed Gifts: \$25.00
Total Gifts: \$25.00

Gifts | **Members** | **Notes**

Page 1 of 1

All My Categories

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

| Subject | Actions | Author | Last Modified |
|---|---|--------------------|----------------------|
| Best fundraisers again at the halfway point | View/Edit
Delete | Site Administrator | Nov 29, 2012 5:48 PM |

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

6. On the Notes edit page:
 - a. Enter a **Subject** to display in the Notes list to identify the reason or purpose of the note.
 - b. Select the **Security Category** of the appropriate administrators allowed to view, edit, and print this note.
 - c. In the Text area, enter the content of the note.
 - d. When you are done, click **Finish**.

Identifying a Team With Notes

When notes have been recorded about a team, the Notes icon displays in the Teams list to the right of the team name. You can click the icon to display the list of Notes available for the team.

Manage TeamRaisers


TeamRaiser List
Participants
Teams
Local Companies
Unconfirmed Gifts
Event Gifts
Coaching Emails
Library

Run For Life 2011

This is a list of teams that have been formed for this TeamRaiser. Use the Manage action to view information about the team and its members or record a donation to the team.

Teams

Records 1 - 2 of 2 [First](#) | [Previous](#) | [Next](#) | [Last](#)

| Name | Action | Team Captain | Company | Team Goal |
|------------------------------|--|--|---------|-----------|
| TeamBrown
ID: 1040 |  | | | \$0.00 |
| TeamRedd
ID: 1041 | Manage
Disband Team
Select New Captain | Chris Redd
devnull+cr@convio.com | | \$0.00 |

Records 1 - 2 of 2 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Reading Notes About a Team

► To display the notes about a team:

1. From the TeamRaisers list, click **Manage** from the **Actions** column of the TeamRaiser event.
2. On the Find Participant page, click the **Teams** tab.
3. On the Teams list page, click **Manage Team** from the **Actions** column of the appropriate team.
4. On the Team Details page, click the **Notes** tab.
5. In the Notes list, click **View/Edit** from the **Actions** column of the appropriate note.

TeamRaiser List | Participants | **Teams** | Local Companies | Unconfirmed Gifts | Event Gifts | Coaching Emails | Library

Run For Life 2011 > TeamBrown

Related Actions

- ▶ Create a Team Note
- ▶ Print the Notes

This is a summary that shows the information about the Gifts and Members of the selected team. Click Record Team Donation to enter a donation made on behalf of the team. In the Gifts list, use the View/Edit action to see information about the donor, edit the name to display on the Team Gift List, and change the amount of an unconfirmed cash or check gift. Use the Members tab to see the team roster and work with the TeamRaiser profiles of the members. Use the Notes tab to record and view notes about the team.

TeamBrown (ID: 1040)

| | |
|---|--|
| Captain:
Pat Brown
11011 Domain Drive
Apt 8102
Austin, TX 78758-7764
devnull+pb@convio.com | Active Members: 1
Team Goal: None
Confirmed Gifts: \$25.00
Total Gifts: \$25.00 |
|---|--|

Gifts | **Members** | **Notes**

All My Categories [v] [Go]

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

| Subject | Actions | Author | Last Modified |
|---|---|--------------------|----------------------|
| Best fundraisers again at the halfway point | View/Edit
Delete | Site Administrator | Nov 29, 2012 5:48 PM |

Records 1 - 1 of 1 [First](#) | [Previous](#) | [Next](#) | [Last](#)

Printing the Notes About a Team

▶ To print the notes about this team:

1. From the TeamRaisers list, click **Manage** from the **Actions** column of the TeamRaiser event.
2. On the Find Participant page, click the **Teams** tab.
3. On the Teams list page, click **Manage** from the **Actions** column of the appropriate team.
4. On the Team Details page, click the **Notes** tab.
5. From the Related Actions on the Notes list page, click **Print the Notes**.
6. When the note page opens in a separate browser window, follow the normal print process in your environment to print the page of notes displayed.

TeamTwo Notes

Registered Early
Site Administrator
Nov 30, 2012 9:59 AM

Team got going early

Top Fundraising Team Last Year
Site Administrator
Nov 30, 2012 10:00 AM

This team really goes hard. I am going to contact TC to see if he can evangelize his methods to other captains.

Self-Service PC2 Team Options

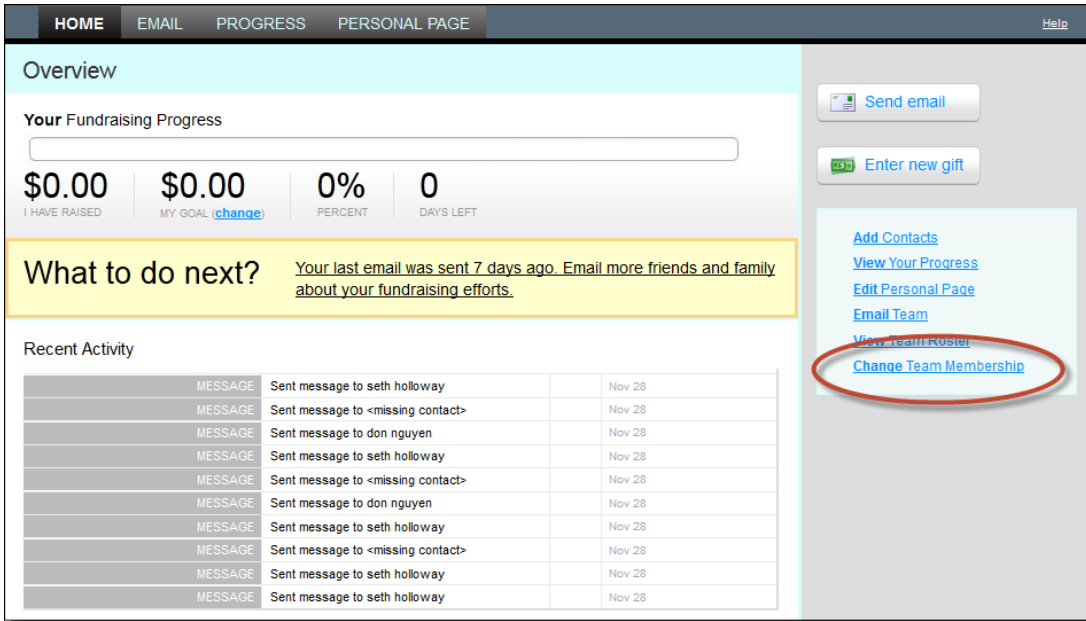
Previously, if a Participant wanted to change their team or re-register as an individual, they had to call the organization's support line and ask someone to change it. In order to reduce the amount of calls to support, new self-service options in the Participant Center that allow Participant's to:

- Switch to another team
- Register as an individual after they are already registered with a team
- Register with a team after they are already registered as an individual

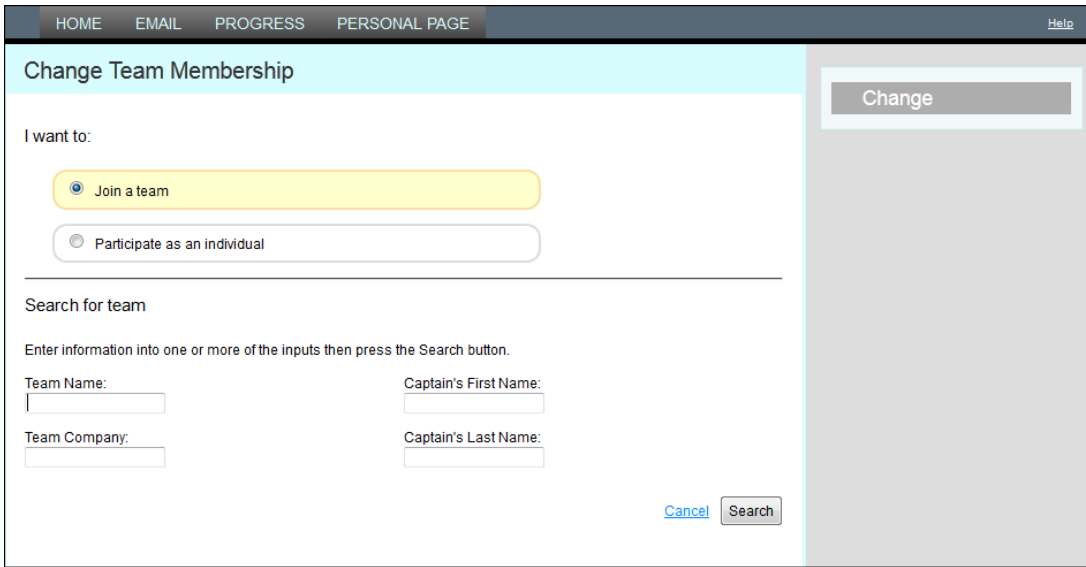
Gifts follow the Participant wherever they go, if they change teams, join a team, or leave a team and become an individual Participant.

► **To access the self-service options**

1. Login to the Participant Center.
2. Click **Change Team Membership**.



3. Select either **Join a team**,



4. Or **Participate as an individual**.

The screenshot shows a web interface for changing team membership. At the top, there is a navigation bar with links for HOME, EMAIL, PROGRESS, and PERSONAL PAGE, and a Help link on the right. The main heading is 'Change Team Membership'. Below this, the text 'I want to:' is followed by two radio button options: 'Join a team' and 'Participate as an individual'. The 'Participate as an individual' option is selected and highlighted in yellow. Below the options, a warning message states: 'Selecting this option will remove you from your current team'. At the bottom right, there are two buttons: 'Cancel' (a blue link) and 'Continue' (a grey button). On the right side of the form, there is a vertical sidebar with a 'Change' button at the top.

► **To enable the self-service options**

1. Click **Fundraising > TeamRaiser**.
2. Click **Edit** in the Action column for the correct event.
3. Click **Event Options > Edit Advanced Options > Define Event Options**.
4. Scroll down to item 9, **Participant Team Self Management** and select the option.

