Luminate Online New Features Guide

3/6/2013 Blackbaud Luminate Q1 2013 Luminate Online New Features US

New Features

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

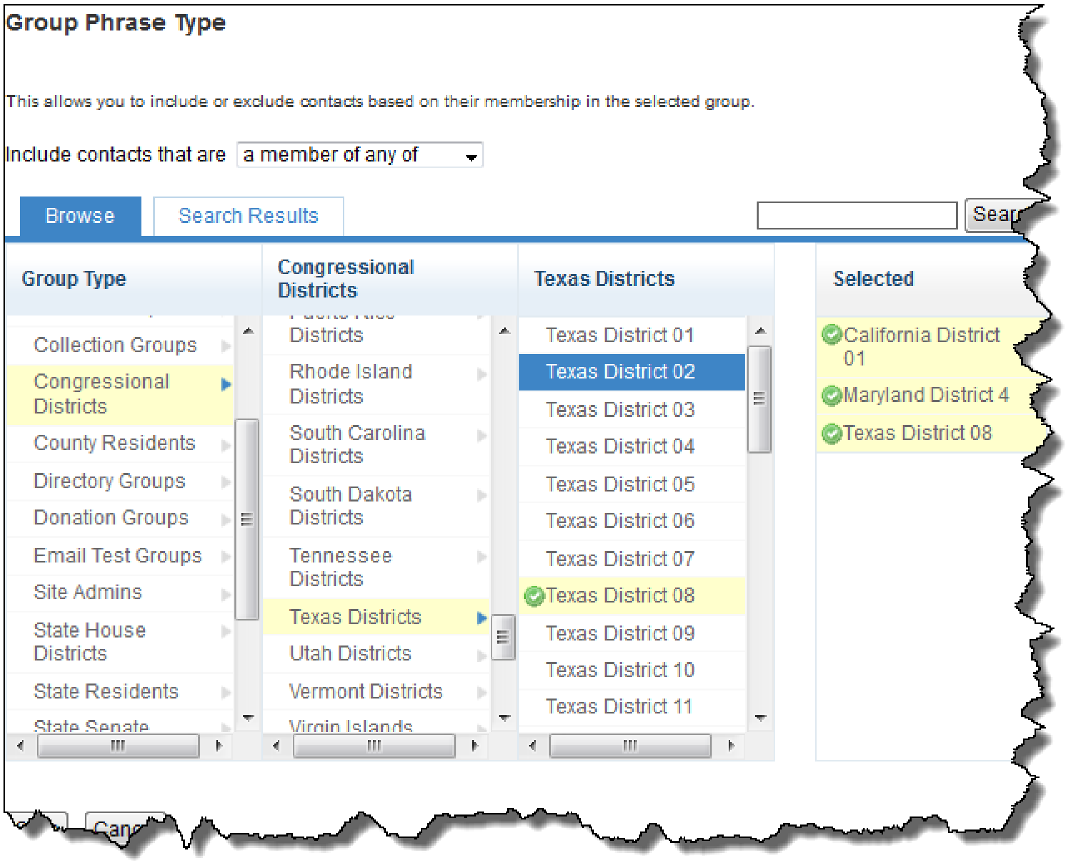
To send an email to the constituents of the representatives targeted in an Action Alert, you create a query-based group. Previously, the process of creating the query was very labor-intensive. The process is much faster with the new **Add an Action Alert Clause** button.

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:

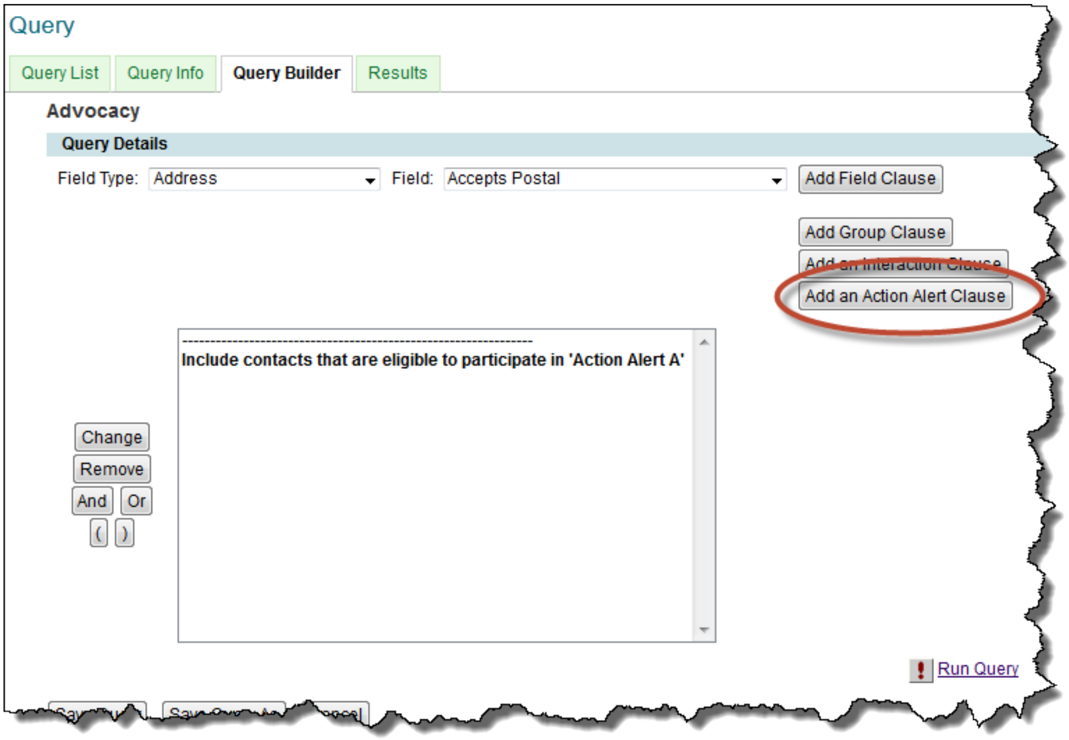
1. Manually select 75 members of Congress who they are targeting (that's 75 clicks).
2. Create a new query and click **Add Group Clause**.
3. Manually select **each** of the 75 congressional districts (for example, California District 1 AND Maryland

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.

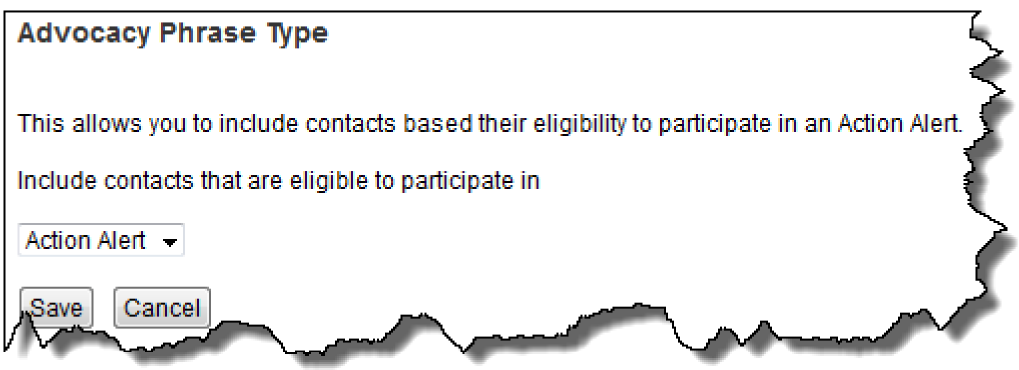


The new query process:

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.

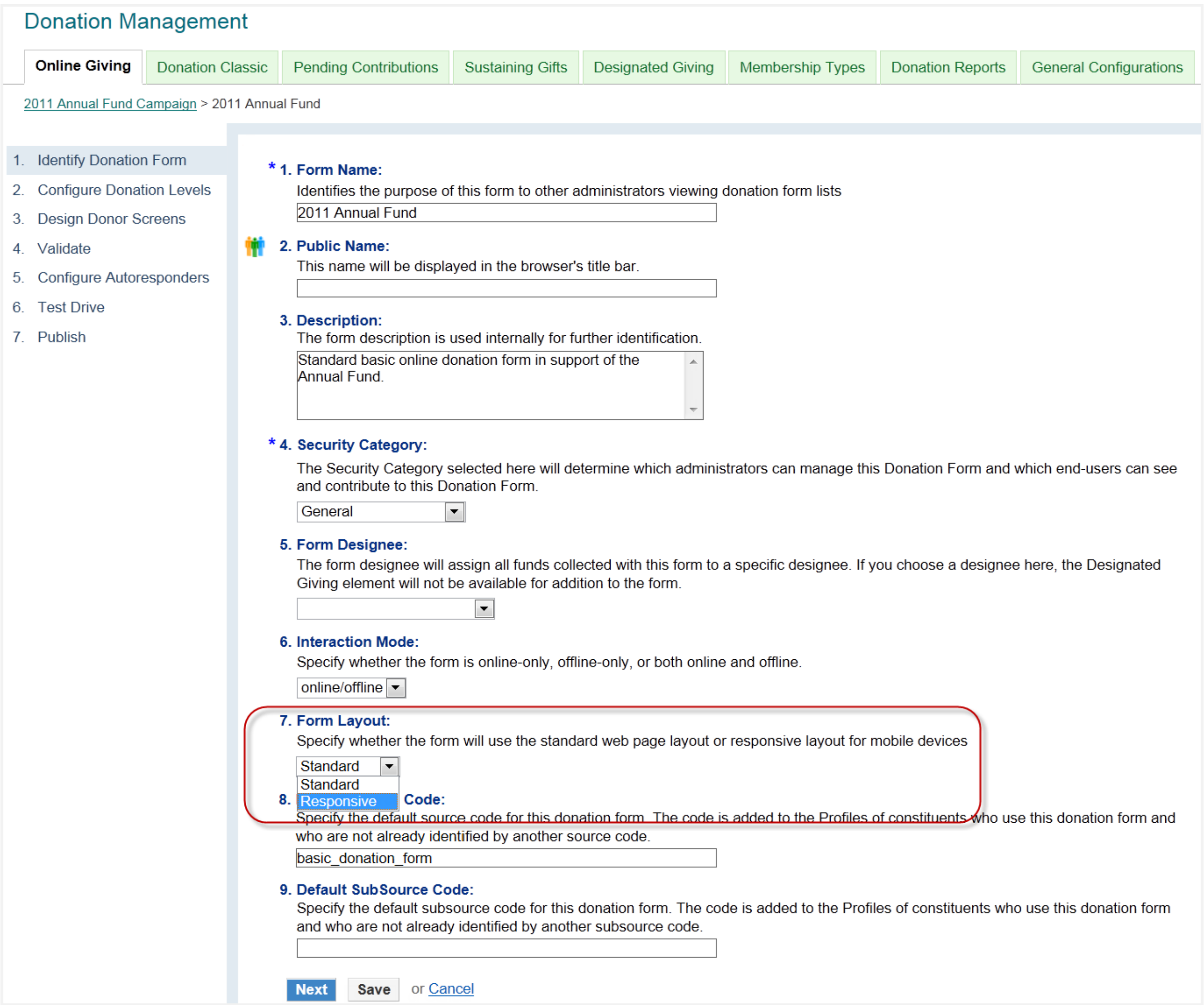
The Standard Donation element in a Responsive layout does not include the column level layouts that can be configured because they are not necessary in the Responsive layout.

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.

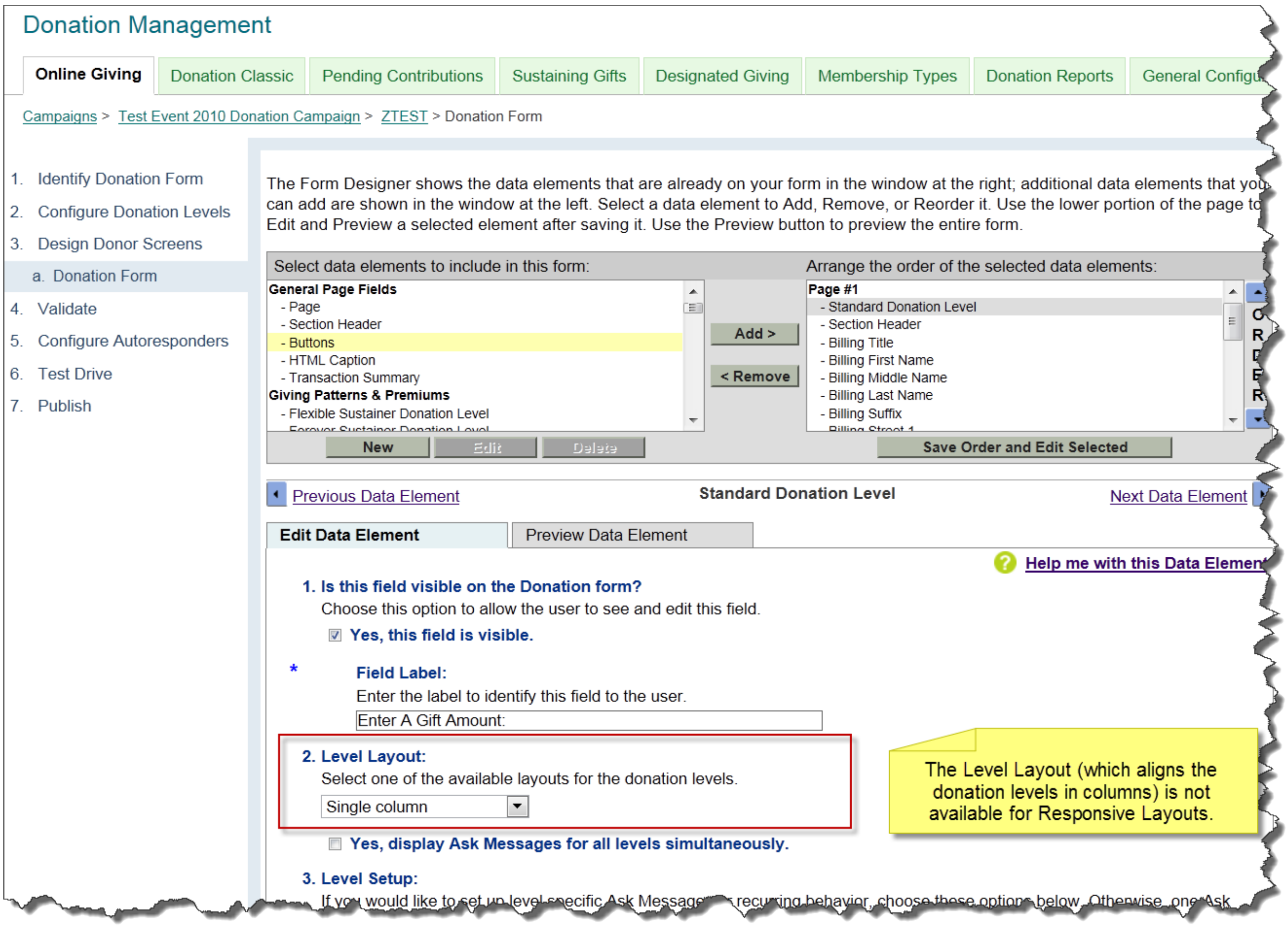
Specifying Responsive as the Form Layout

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.



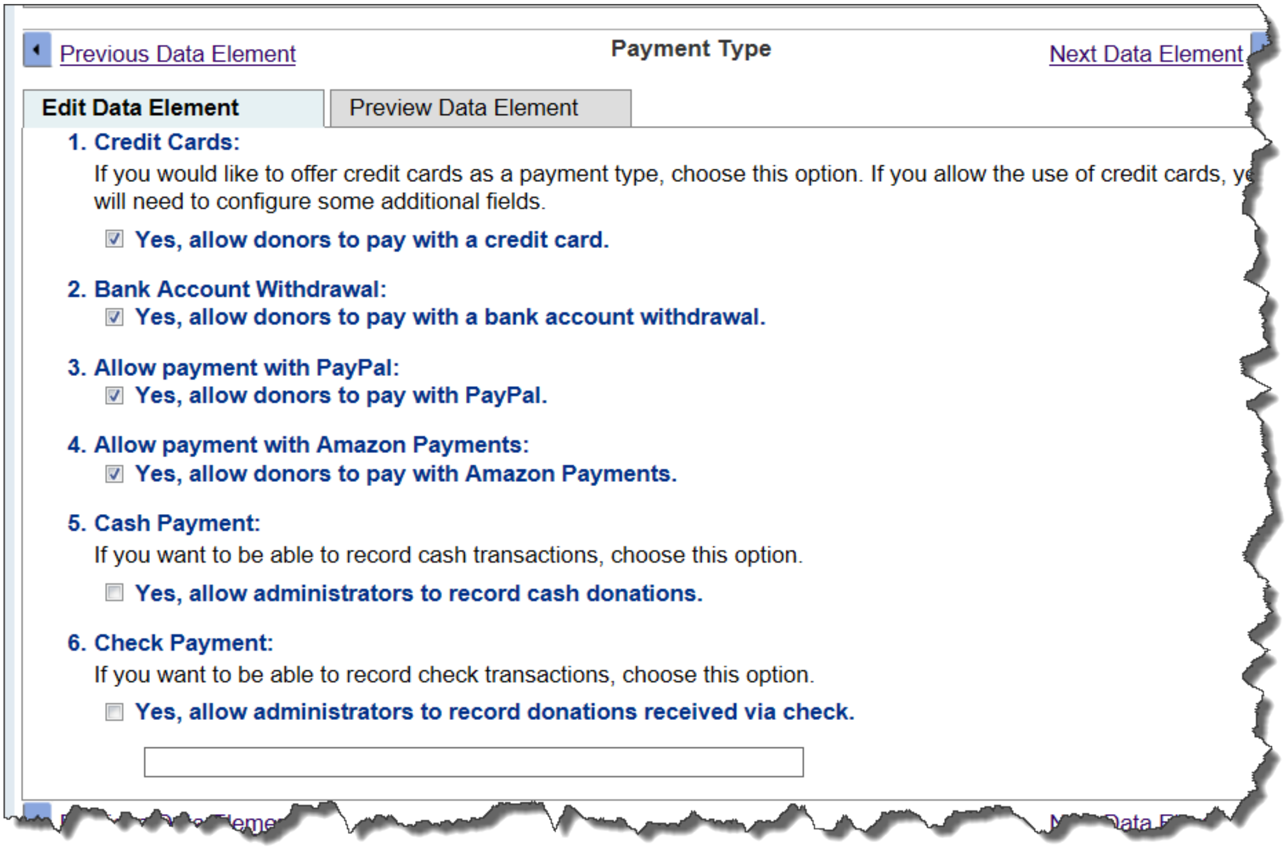
Configuring the Responsive Standard Donation Level Element

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.



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.



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.

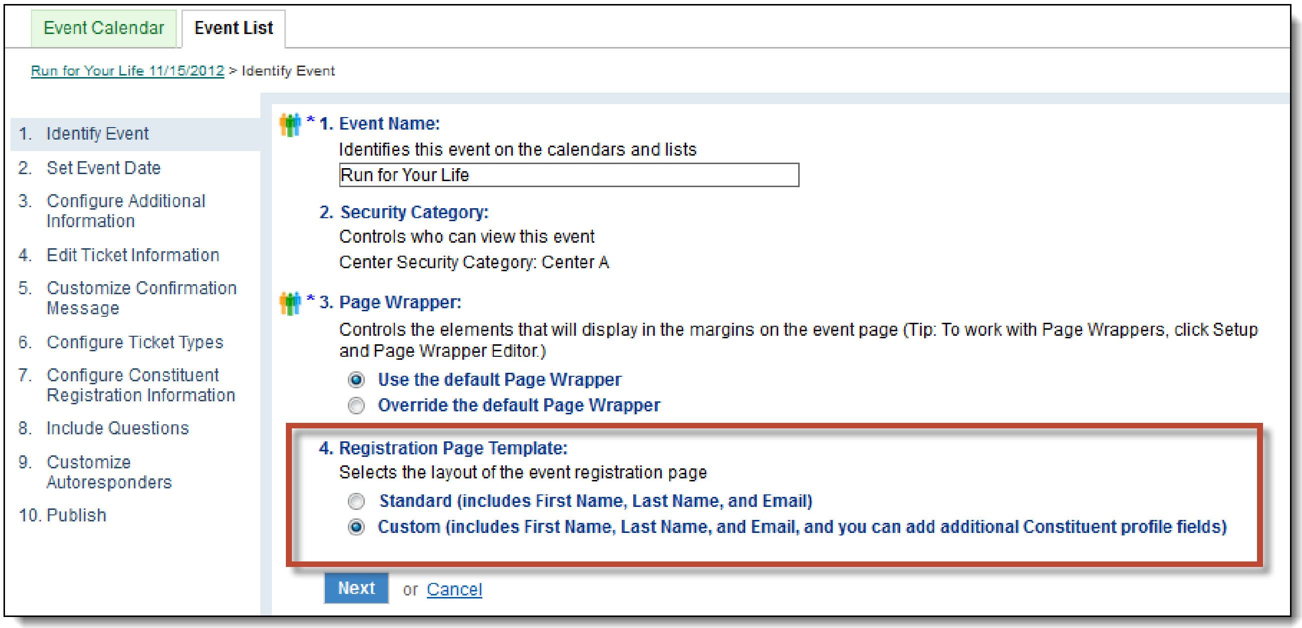
Note: The Constituent360 fields that are available vary depending on how your site is configured.

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**

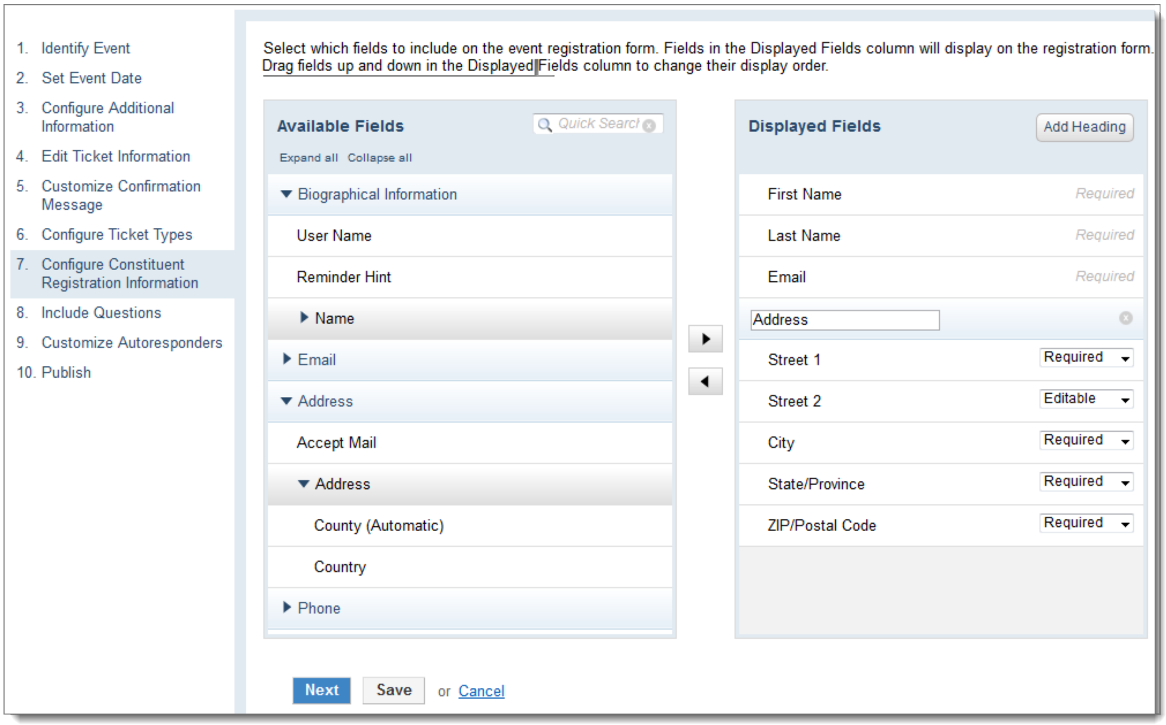
  You can now select either a **Standard** or a **Custom** template for an event registration form. If you select the **Standard** template, no further action is required. If you select the **Custom** template, the next step is to select the registration form fields. Click the **Configure Constituent Registration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



- **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.



Group Attendees by Registration Question Answers

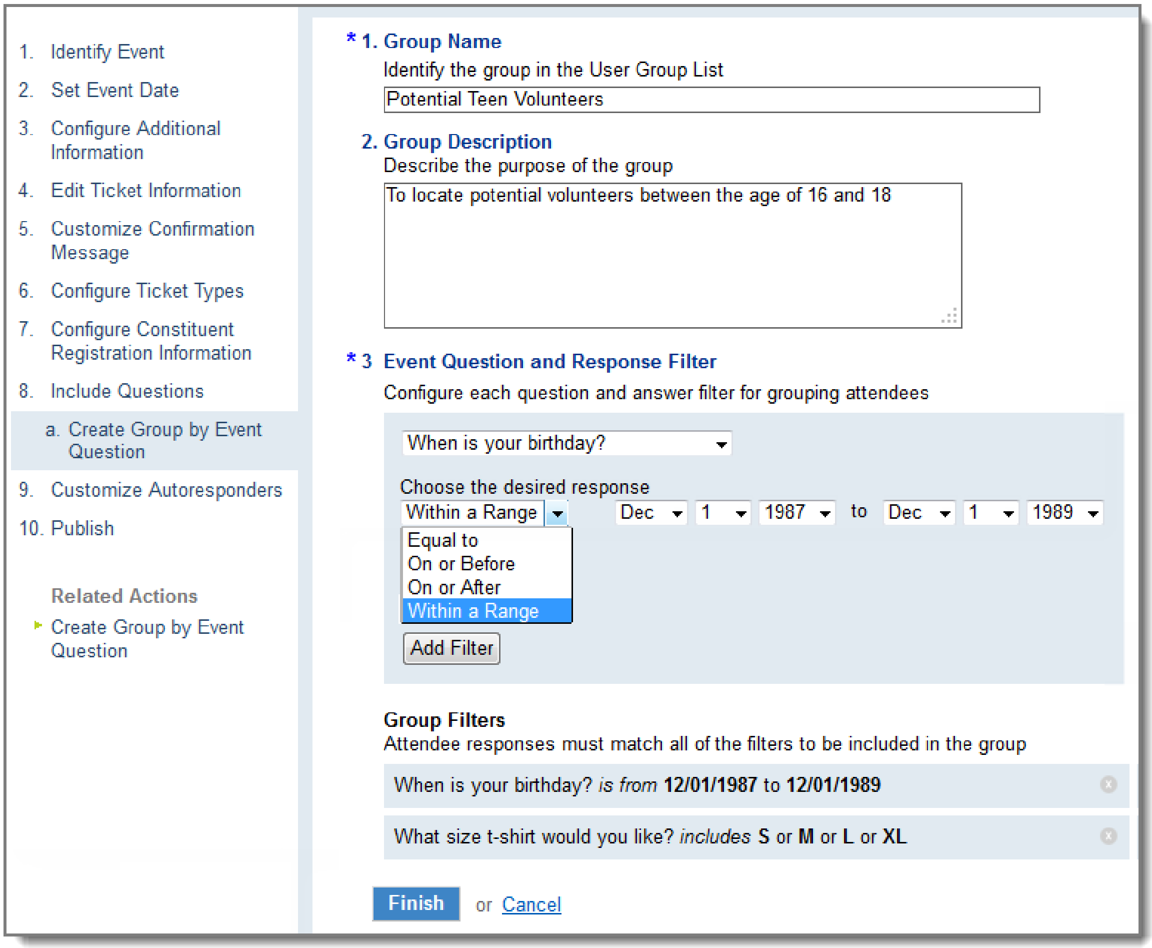
You can now group event attendees based on how they answer questions on the registration page. This can help you to identify certain attendees that require further action. For example, you could ask attendees if they are interested in volunteering for your organization and create a filter that groups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

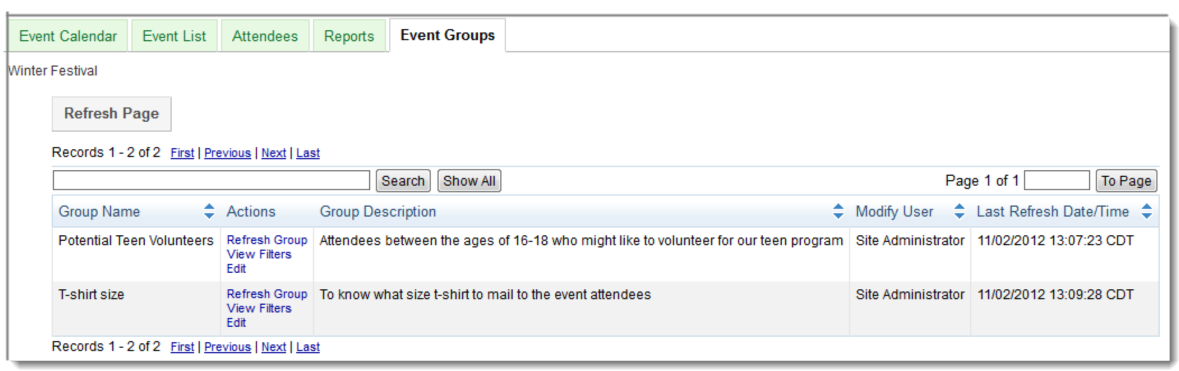
The New Create Group by Event Question Editing Page

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.



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.



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

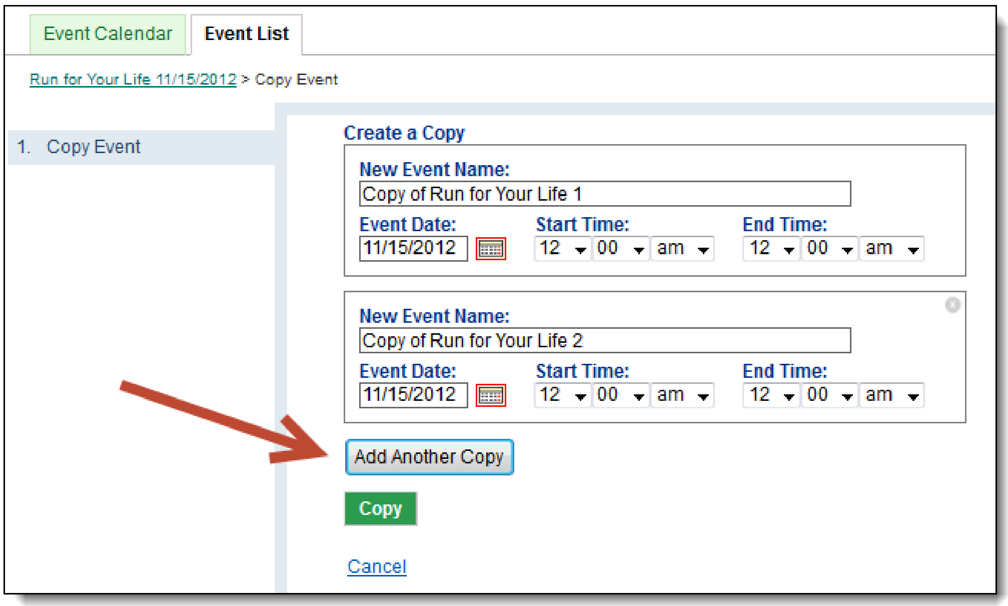
Some additional enhancements have also been made to the Events application including make multiple copies, reorder ticket types, and improved layout of the registration page.

For more information see the Events Enhancements video.

- **Make multiple copies of events**

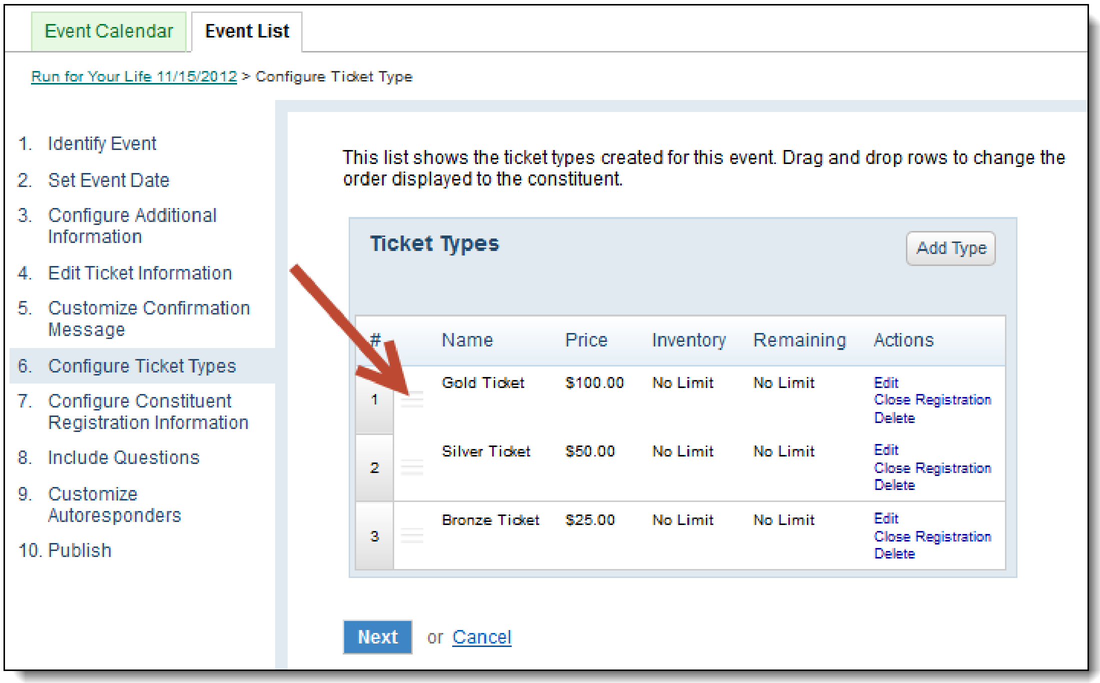
  You can now make multiple copies of an event at one time instead of copying them one by one.

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



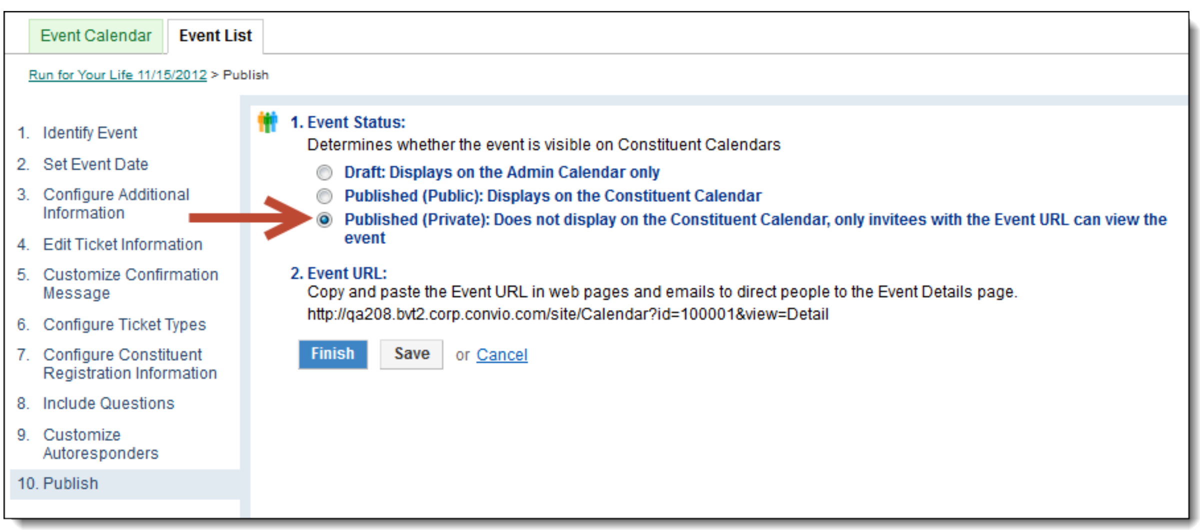
- **Reorder Ticket Types (Coming in Q2)**

  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.



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

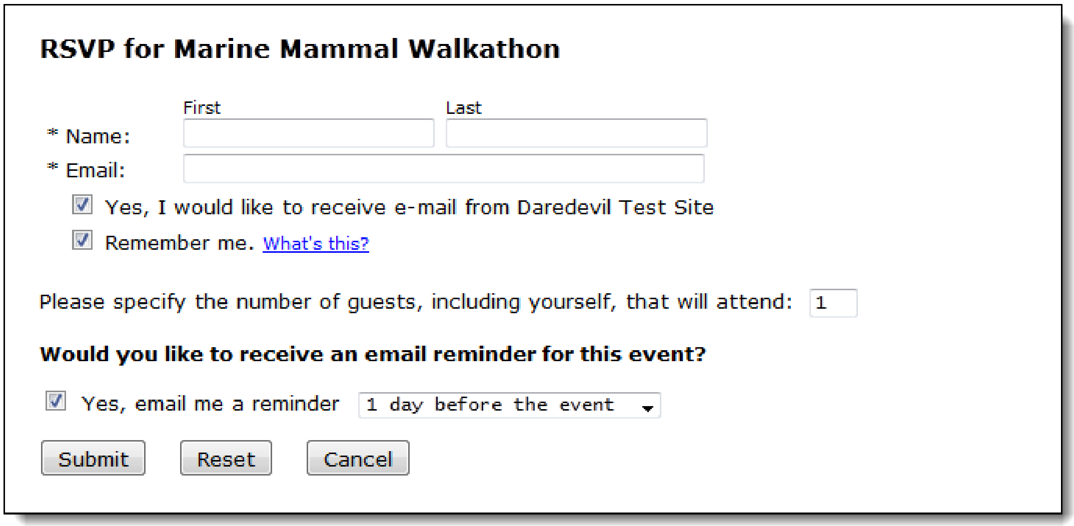
  Previously, when you published an event, it displayed on the Constituent-facing calendar. Now you have the option to publish and event, but keep it private so that it does not display on the Constituent-facing calendar. Only attendees who have been sent the URL can access the registration page.



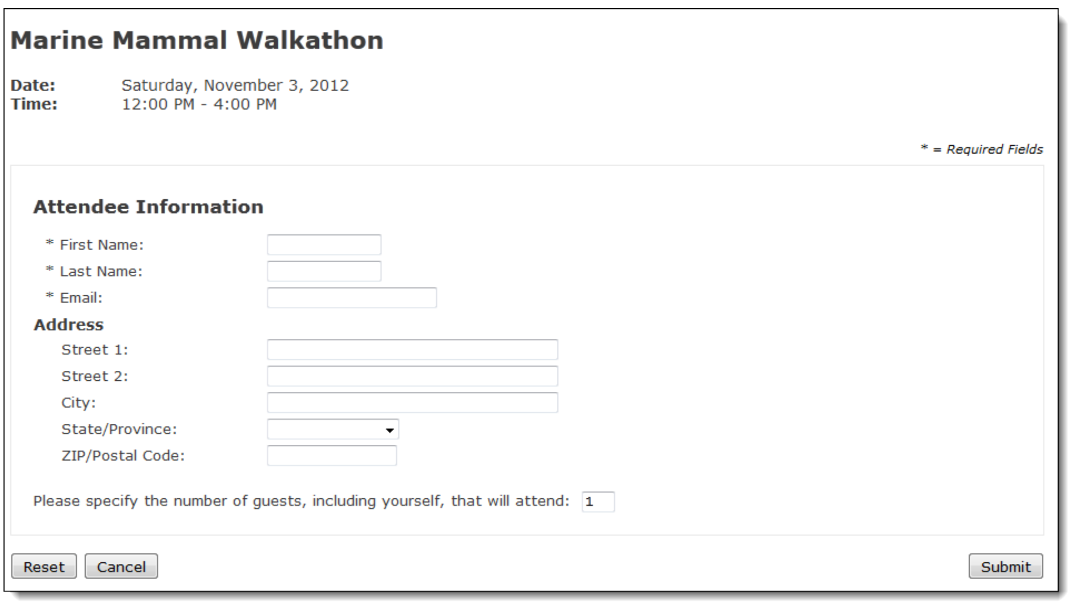
- **Improved Registration Page Layout**

  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:



The new registration page layout:



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.

After setting the HTML5 Document Type Declaration, you can add specific statements and CSS to make the page wrapper and its associated pages responsive to the device layouts. This includes adding the statement to adjust to the deviceand specific layouts for the mobile devices you want to support.

The HTML5 Document Type Declaration option is automatically available in Q1 2013.

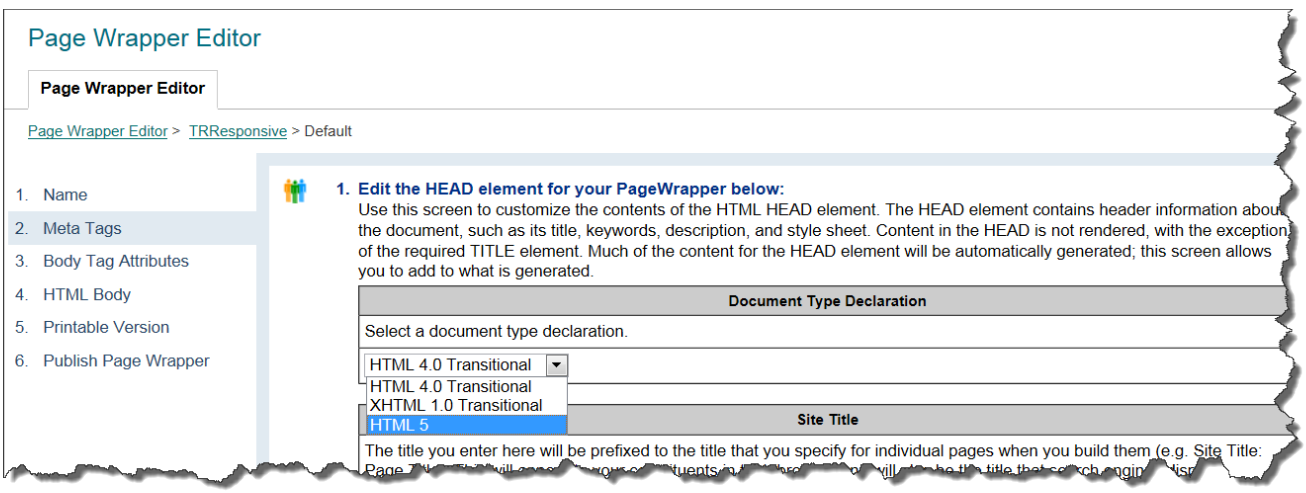
For more information, refer to the following:

- Declaring the Document Type
- Adding the Viewport Statement to Control the Device Width Scaling
- Adding CSS Rules to Control Element Placement and Styling
- Adding the Mobile Class Statement
- Adding HTML for the Elements that Display on the Page Wrapper

For more information, view the HTML 5 Page Wrapper video, or access the online help, click **Help** at the top of any Page Wrapper Editor page in the Admin user interface.

Declaring the Document Type

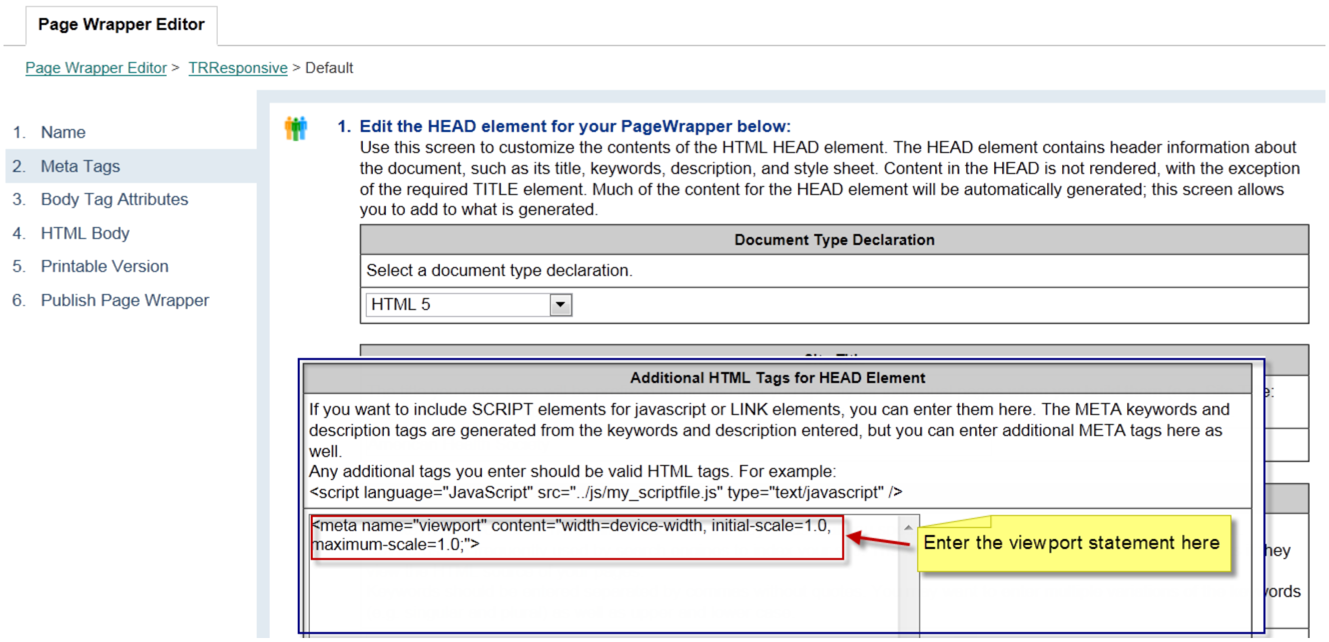
When creating a new or editing an existing page wrapper in the Page Wrapper Editor, you can select HTML5 as the Document Type Declaration on the Meta Tags page.



Adding the Viewport Statement to Control Device Width Scaling

To allow pages associated with this page wrapper to scale automatically in response to the device on which they are being viewed, you can add a viewport statement to the Head element in the Additional HTML Tags section:

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



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.

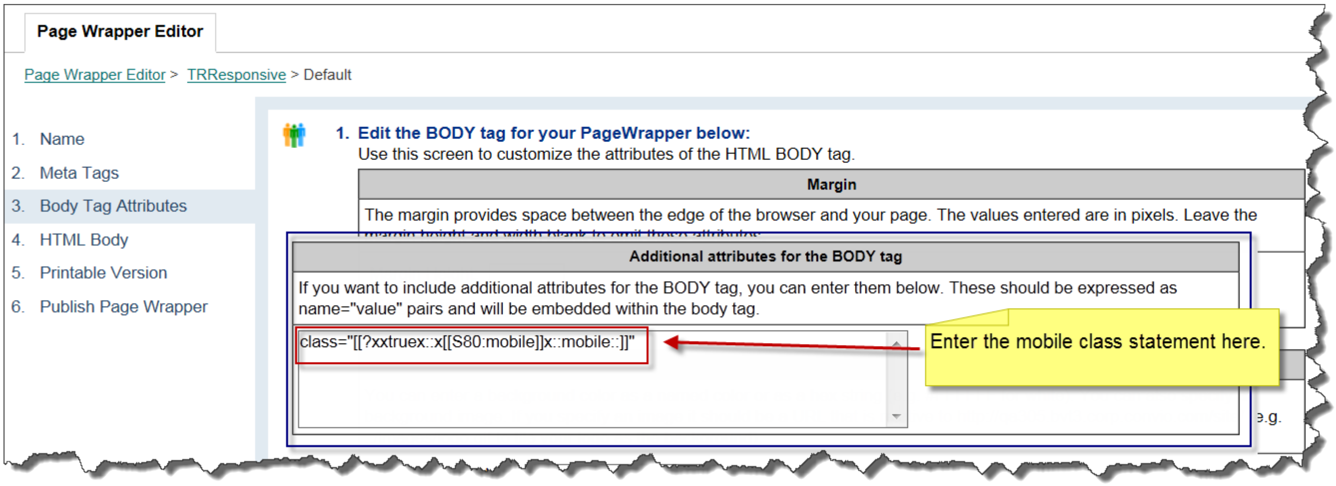
You can define the screen widths and which elements to display or hide on tablet and smart phone devices by inserting media statements in this Additional HTML Tags section. For example, you can code a snippet that hides the login fields on a smart phone by entering display:none for the login-fields div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

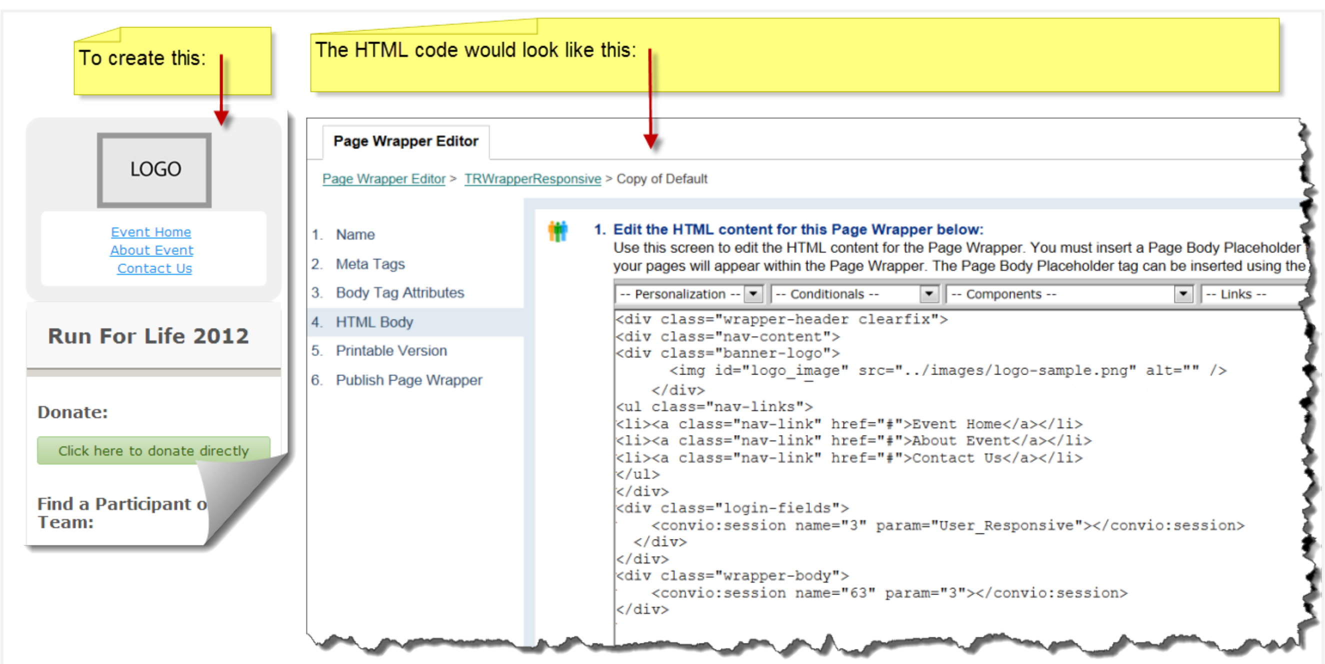
Adding the Mobile Class Statement

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="[[?xxtruex::x[[S80:mobile]]x::mobile::]]").



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.



Payment Capabilities

Site Administrators can use the new Luminate Online*Payment Capabilities* feature to import Blackbaud Merchant Services (BBMS) accounts into Luminate Onlineand 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.

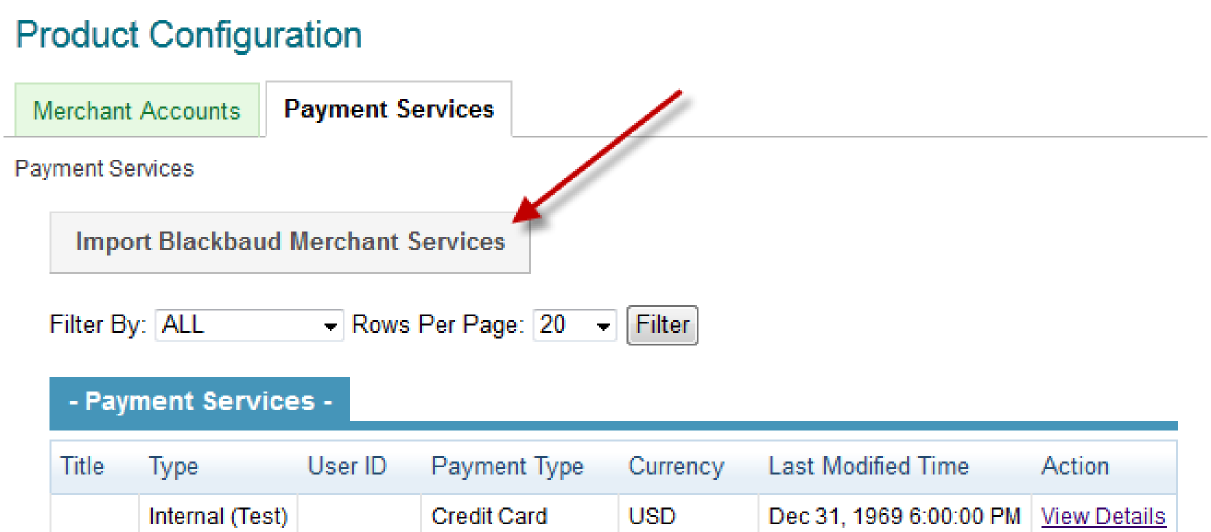
A *Merchant Account* allows your organization to accept donations, recurring gifts, pledges, eCommerce, or event ticket purchase transactions in Luminateand route them through the correct payment service. A Merchant Account is comprised of one or more gateways to payment services.

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](#).



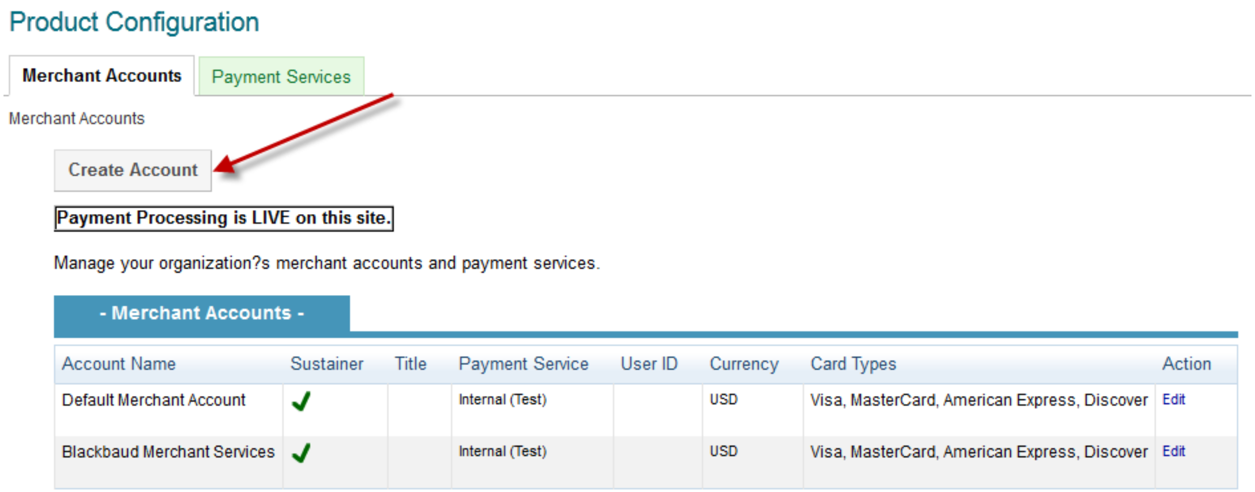
Click **Import Blackbaud Merchant Services**, log in to your BBPS account (not your BBMS account), and click **Import**. The Payment Services page lists the imported BBMS accounts associated with the BBPS account that use the currency supported on your site.

> ***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

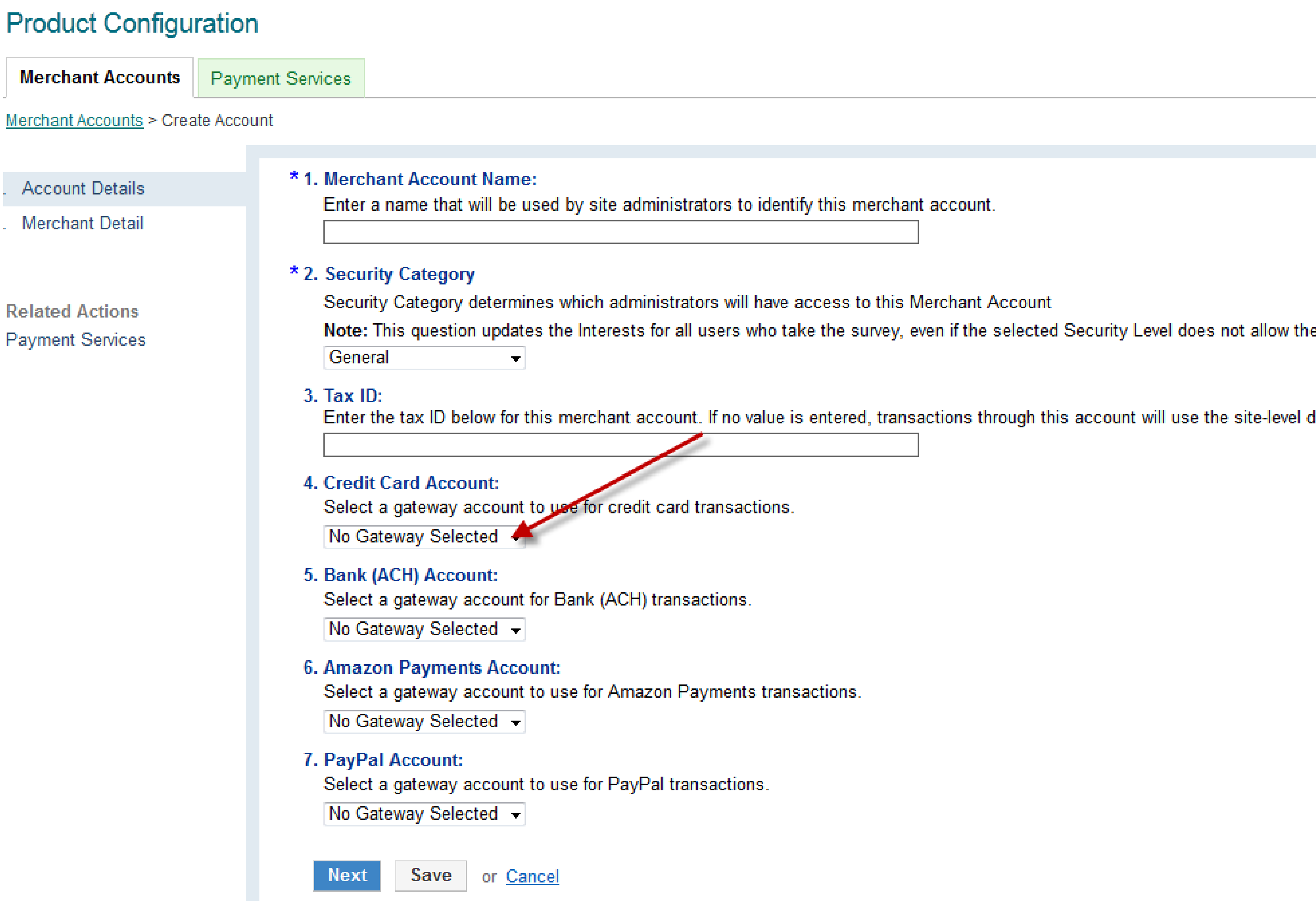
To set up a Merchant Account, which is comprised of one or more Luminate gateways to payment services such as BBMS or PayPal, navigate to Luminate Online **> Setup > Payment Capabilities** and click **Create Account** on the **Merchant Accounts** tab.

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



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.



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.

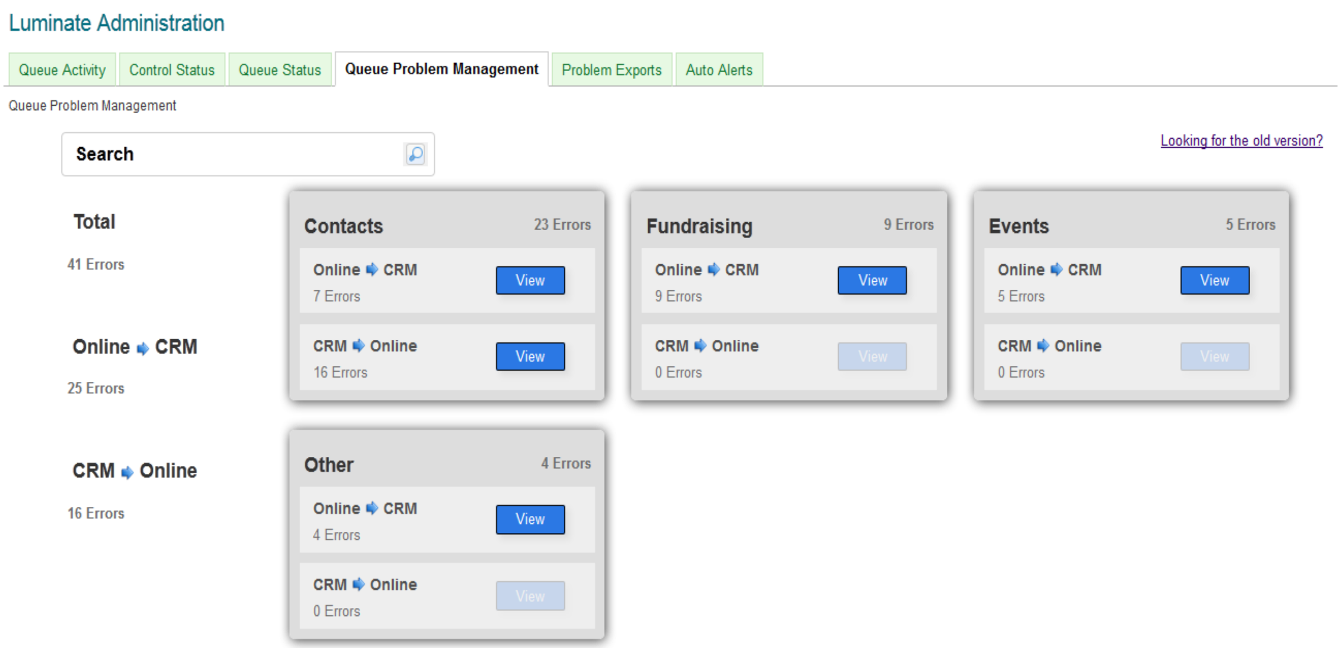
The ZIP file is accompanied by a CSV file that lists the details for each receipt in the batch, such as the name of the constituent, the valued transaction, and date of the transaction.

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.

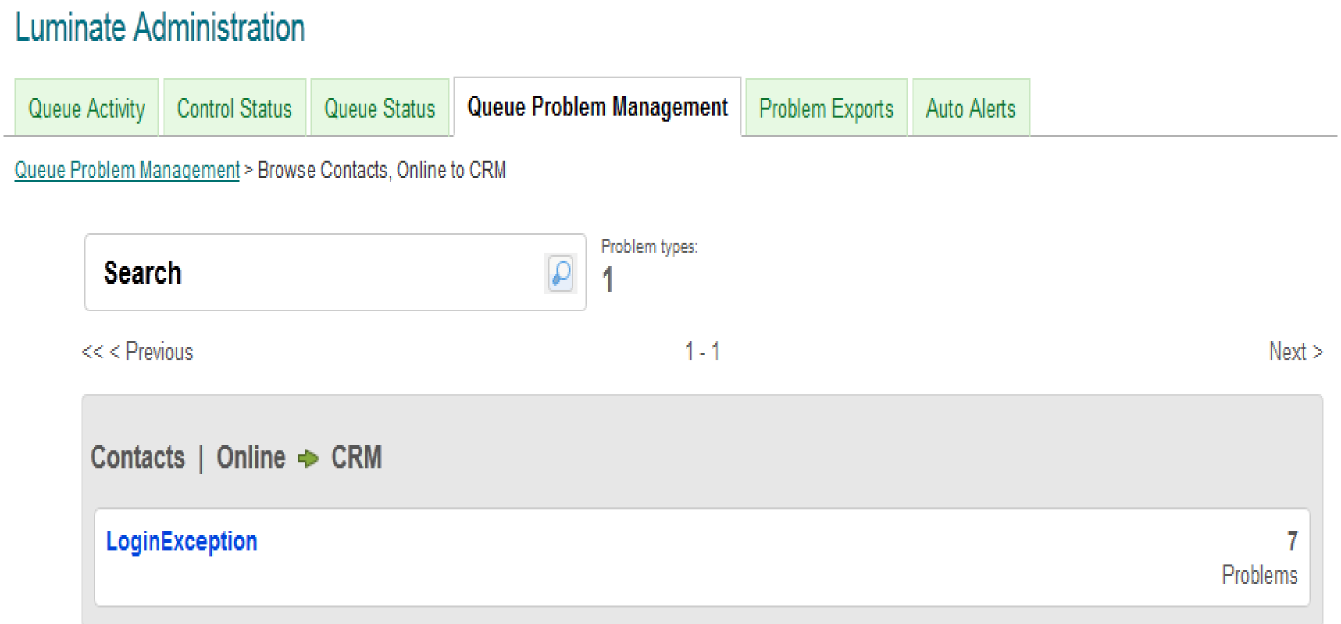
Queue Problem Management

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.

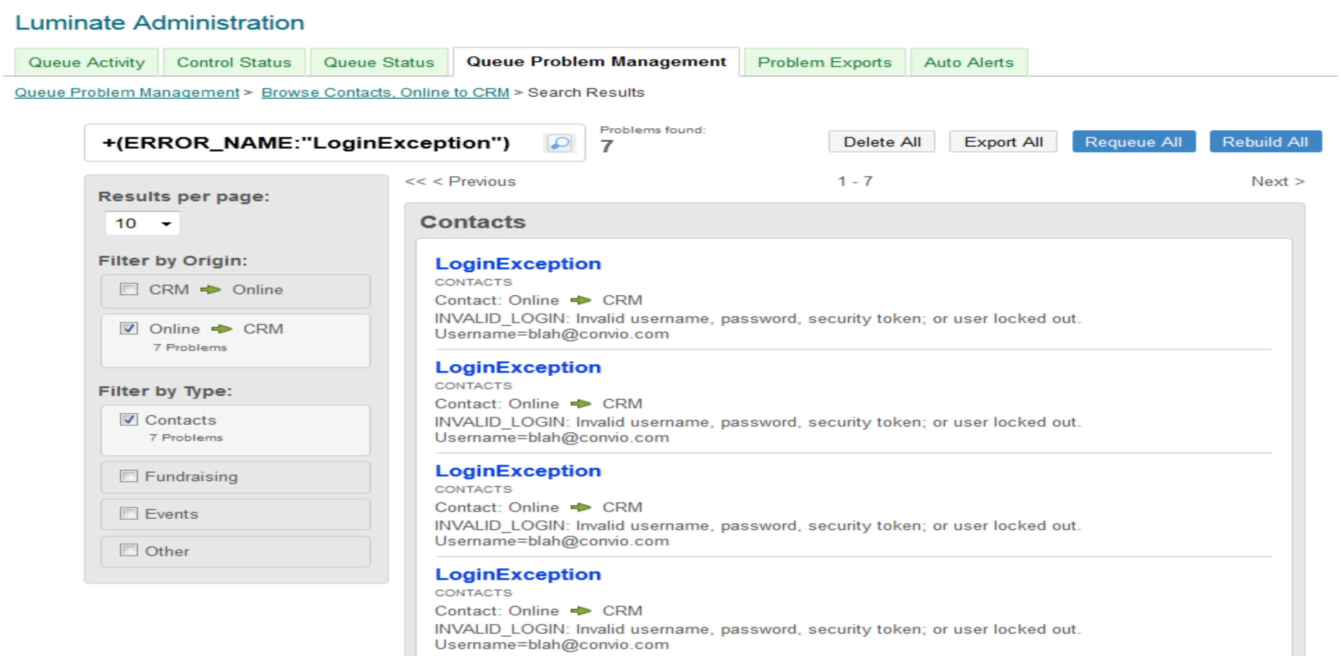
To use the Search feature, navigate to Luminate Online > **Data Management** > **Luminate Management** > **Queue Problem Management**.



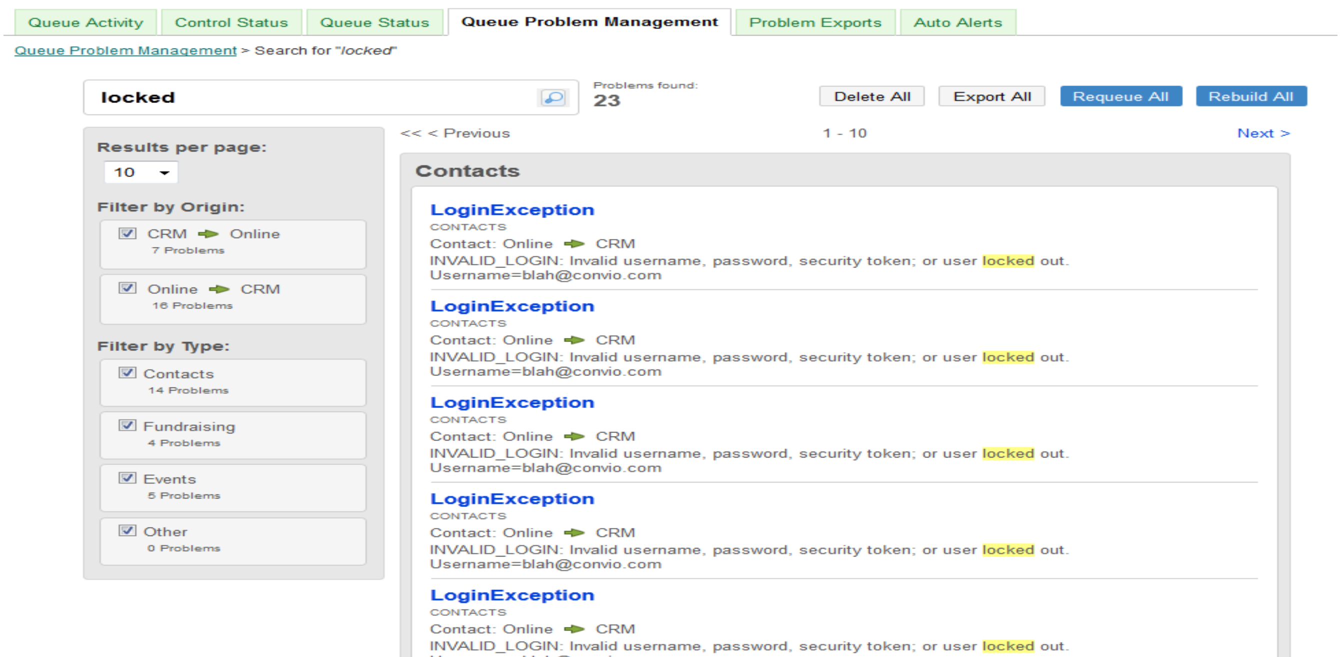
Click **View** to look at errors that occurred when data moved from Luminate Online to Luminate CRM or from Luminate CRM to Luminate Online.



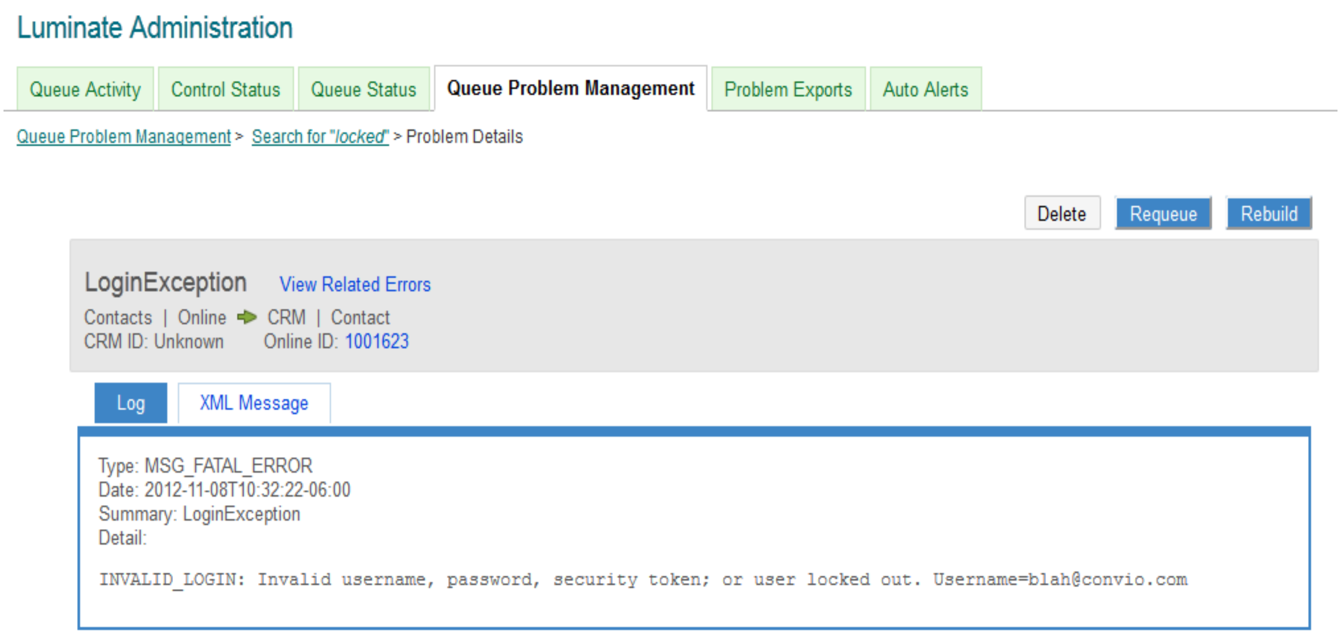
Click the error category link to view all problems in the category.



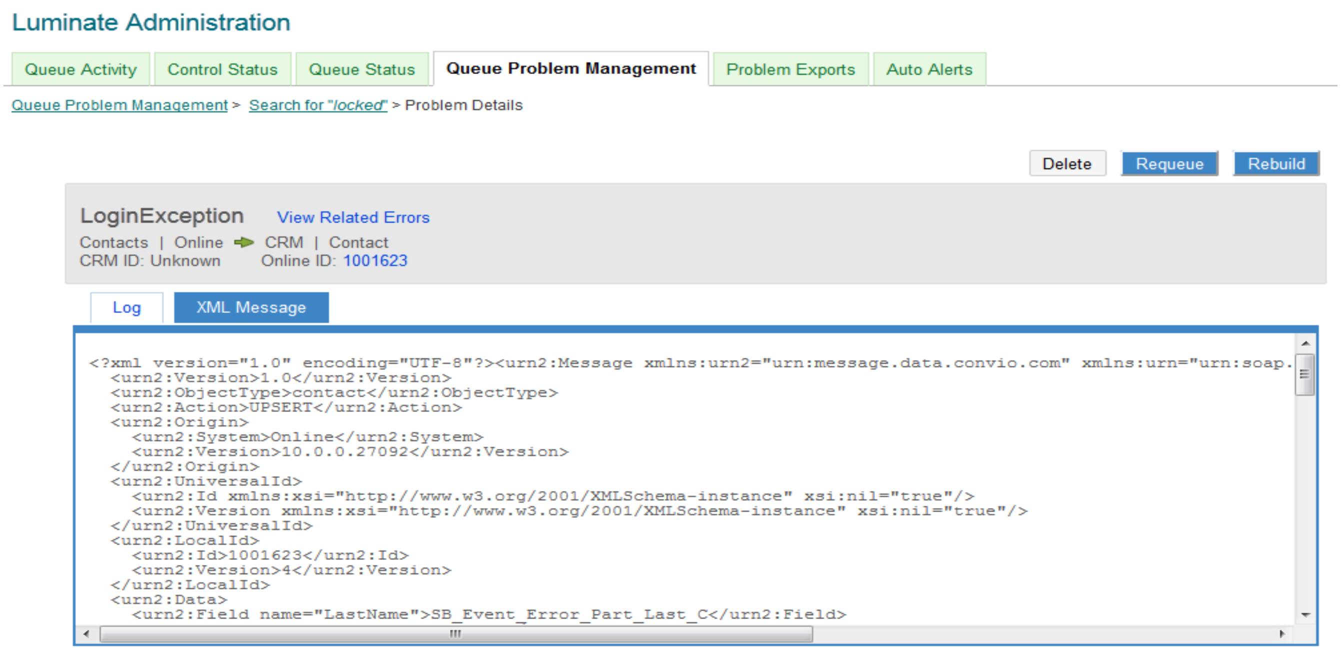
Type a keyword in the Search box and click  to find a particular type of error.



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



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



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.

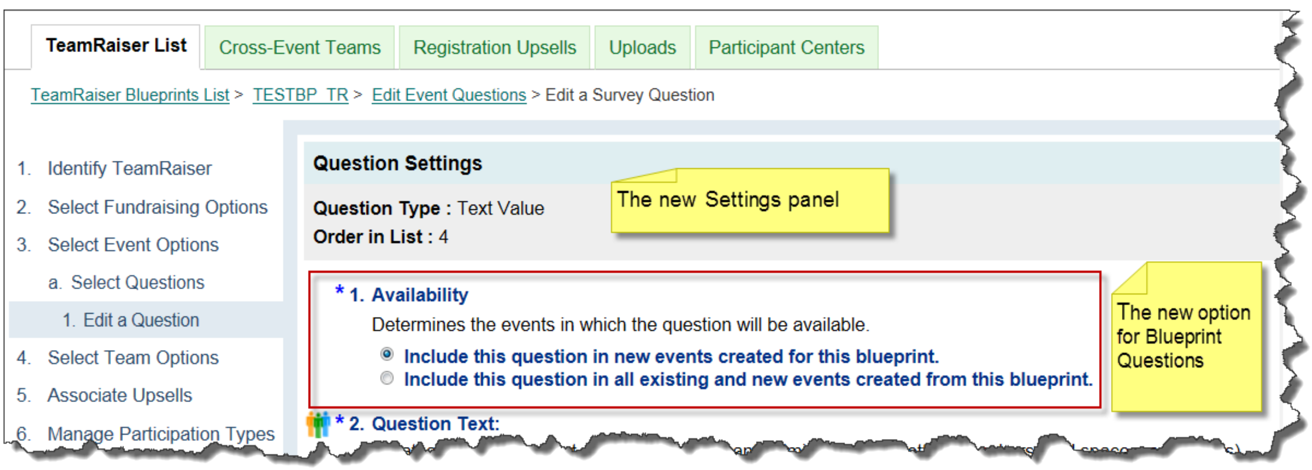
When you add the new question, you can specify where to place it in the list of questions. If the local event administrator has added questions, it is important to note that your question may be interleaved between their local questions. Refer to the Blueprint TeamRaiser online help topic for details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

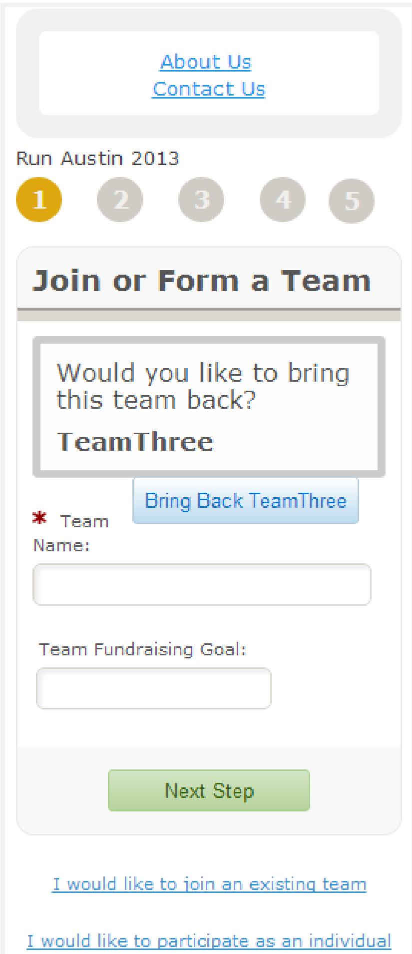
Blueprint TeamRaiser questions lists are available for general event registration questions from the Related Actions on the Select Event Options page, Team Captain questions from the Related Actions on the Select Team Options page, and specific types of participation in the flow for editing or creating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



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.



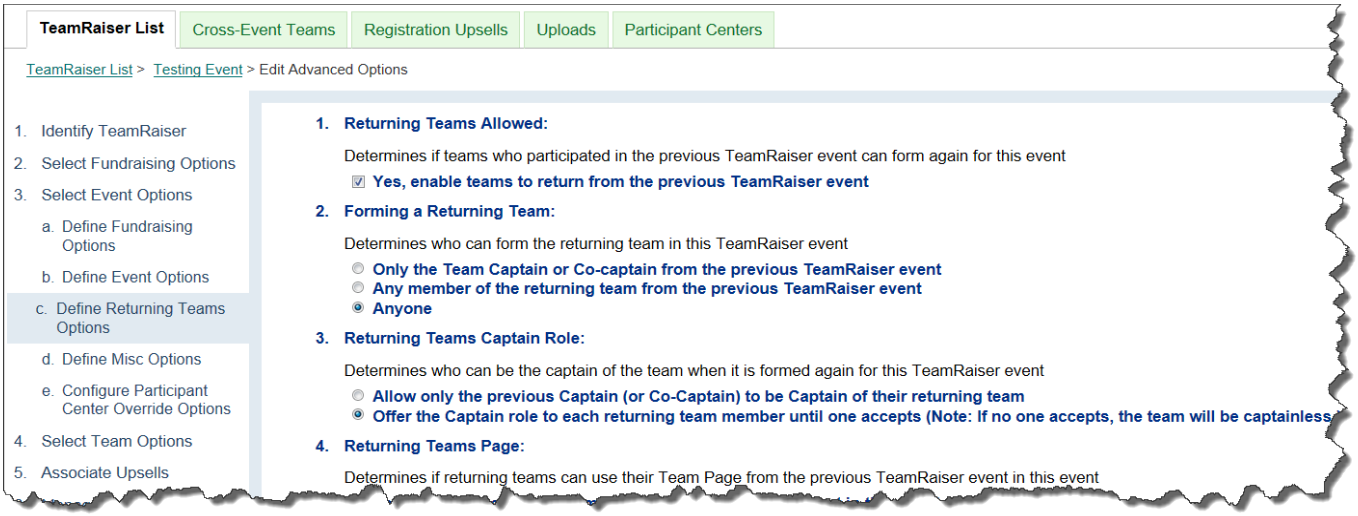
The Bring Back Team prompt is automatically available when the Returning Teams Advanced Event Options are enabled and the TeamRaiser event is linked to a previous event in which the registrant participated on a site in Luminate Online Q1 2013.

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.

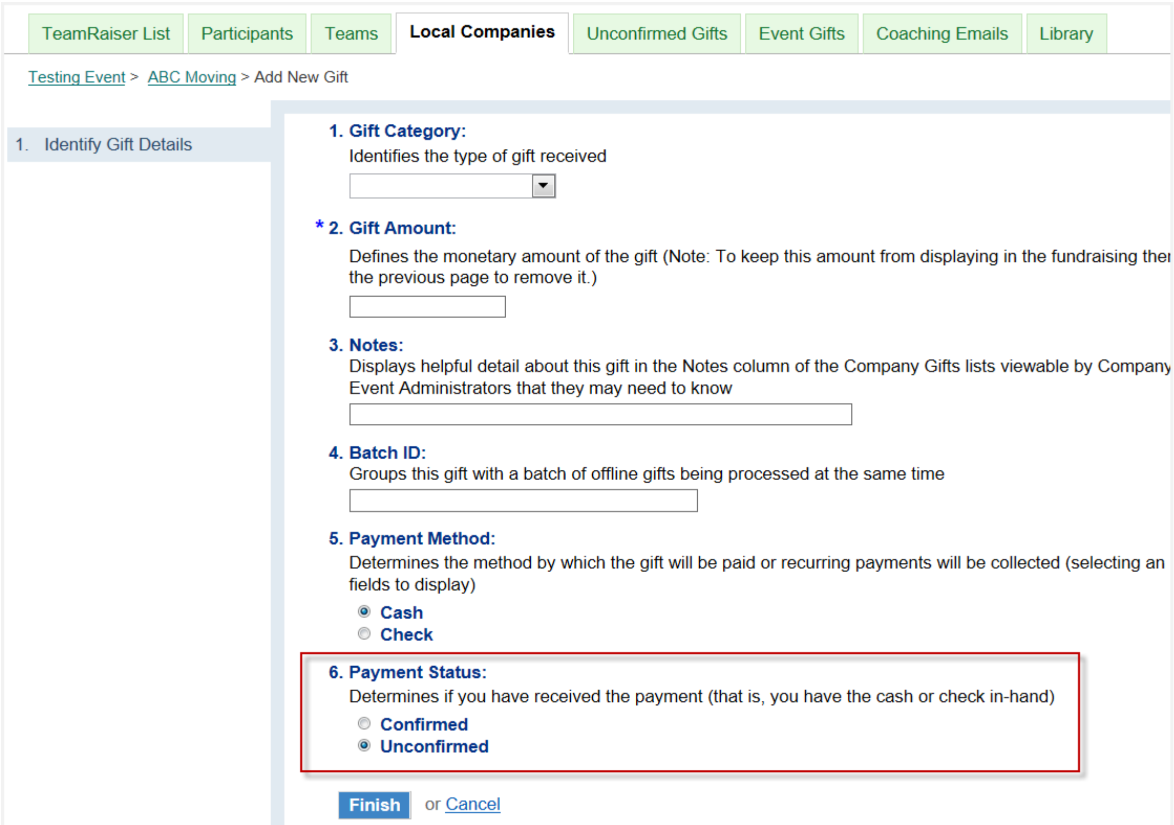
To work with company gifts:

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.



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

Gift Confirmation via Gift Uploads

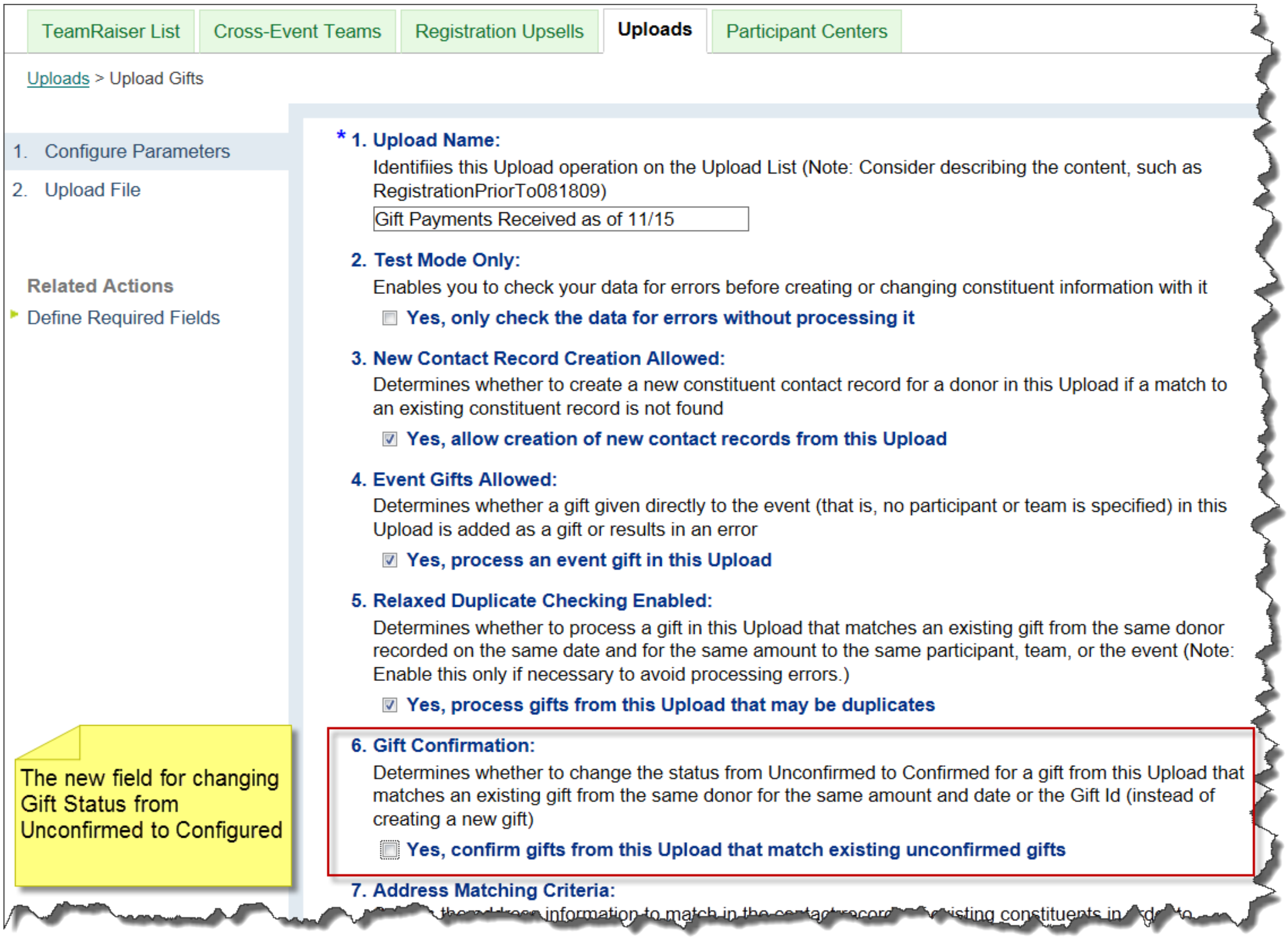
You can now use a gift upload file process to change the Payment Status of gifts recorded in multiple donor profiles from Unconfirmed to Confirmed when the payments have been received instead of manually performing the process in each individual profile or creating new duplicate gift entries.

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:

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



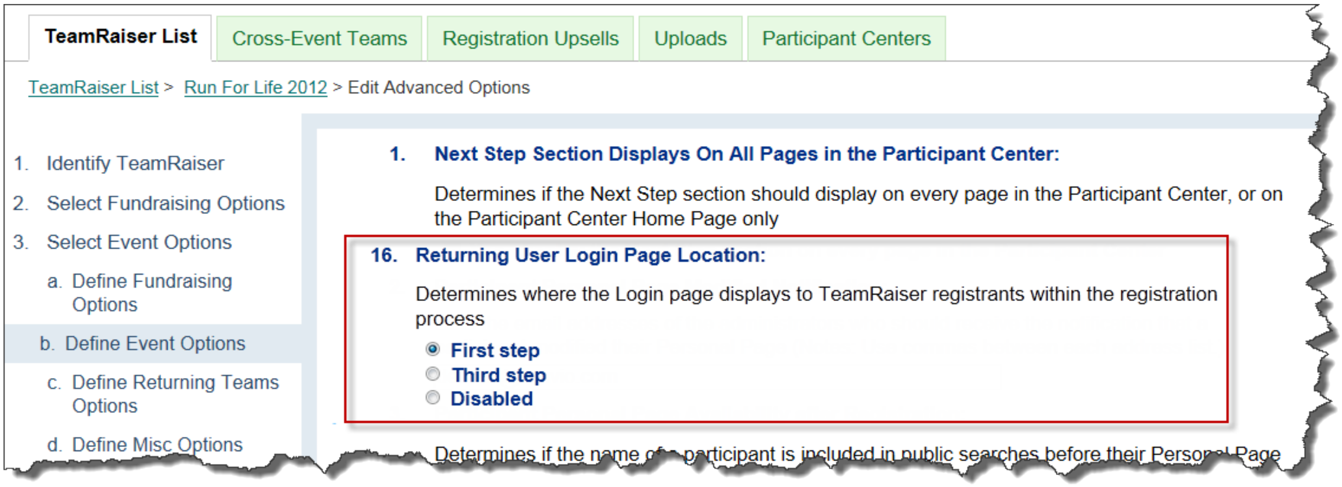
Login Page at Front of the Registration Flow

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**.



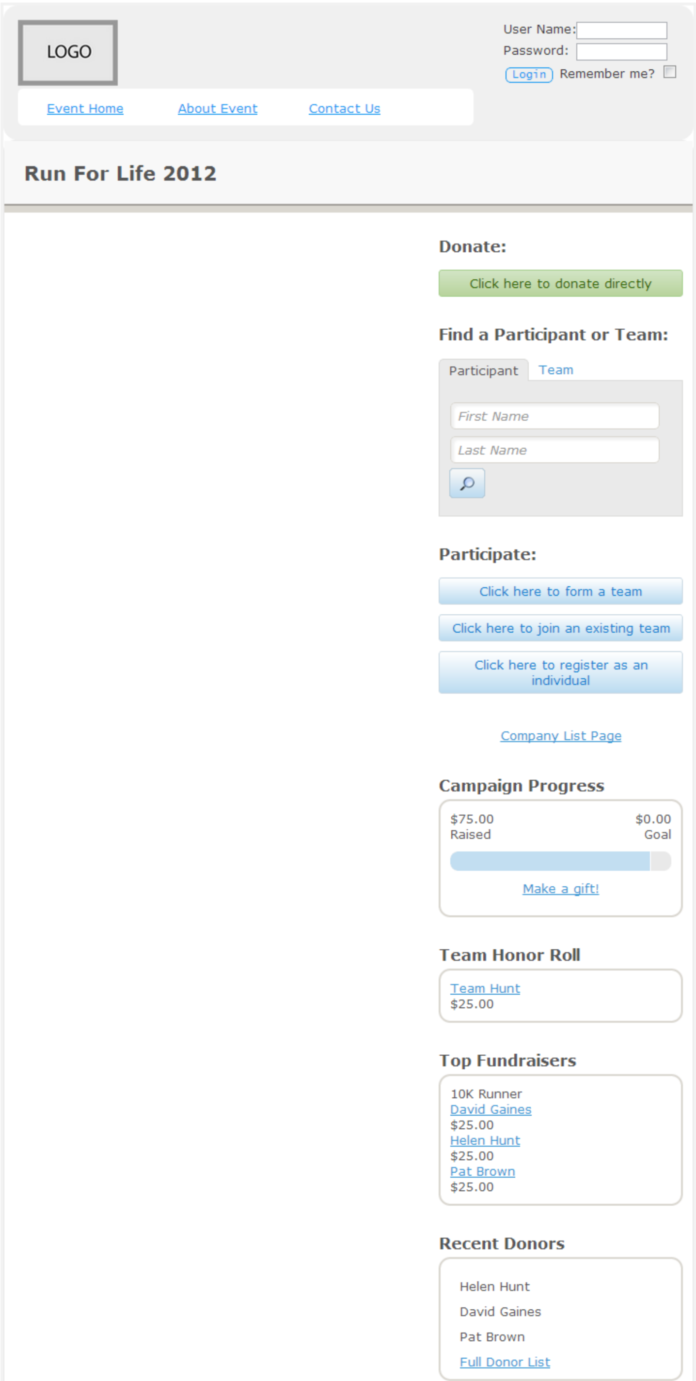
Responsive Layouts for Greeting and Search Pages

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).

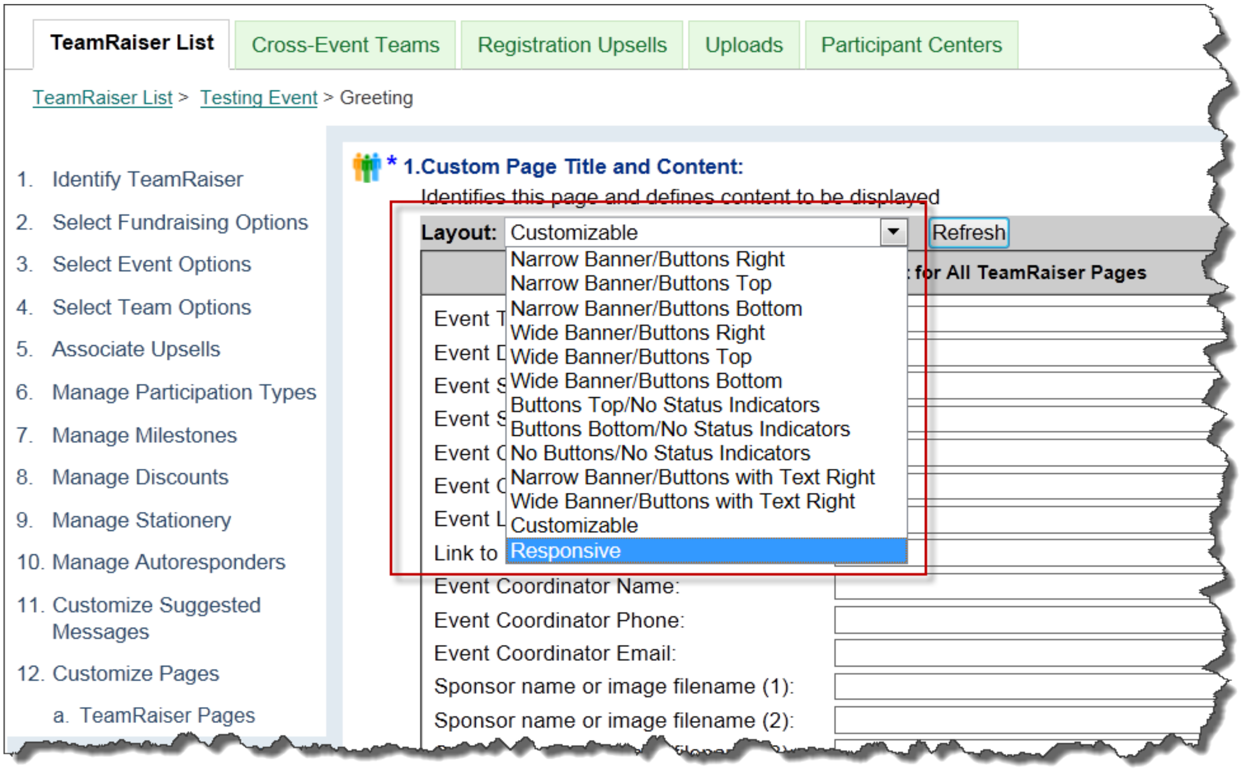


For example, you can specify to hide the Login component on a smart phone.

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).

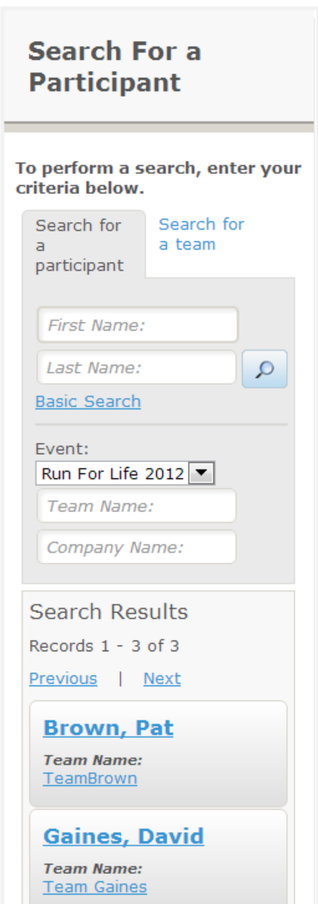


5. Back on the TeamRaiser Pages list, click **Configure** from the **Actions** column of the Find Participant page and repeat the step above.

Configuring the Responsive Layout for the Search Pages

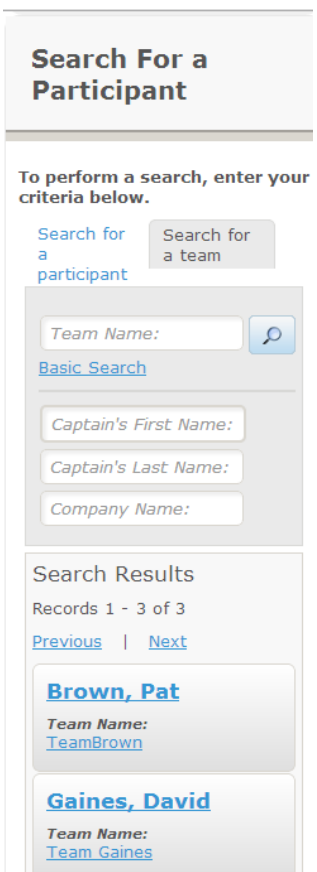
The Search pages for locating a participant or a team have been updated when in the Responsive layout. Enhanced for a more modern look, the default Participant Search displays with two simple fields.

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



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

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



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

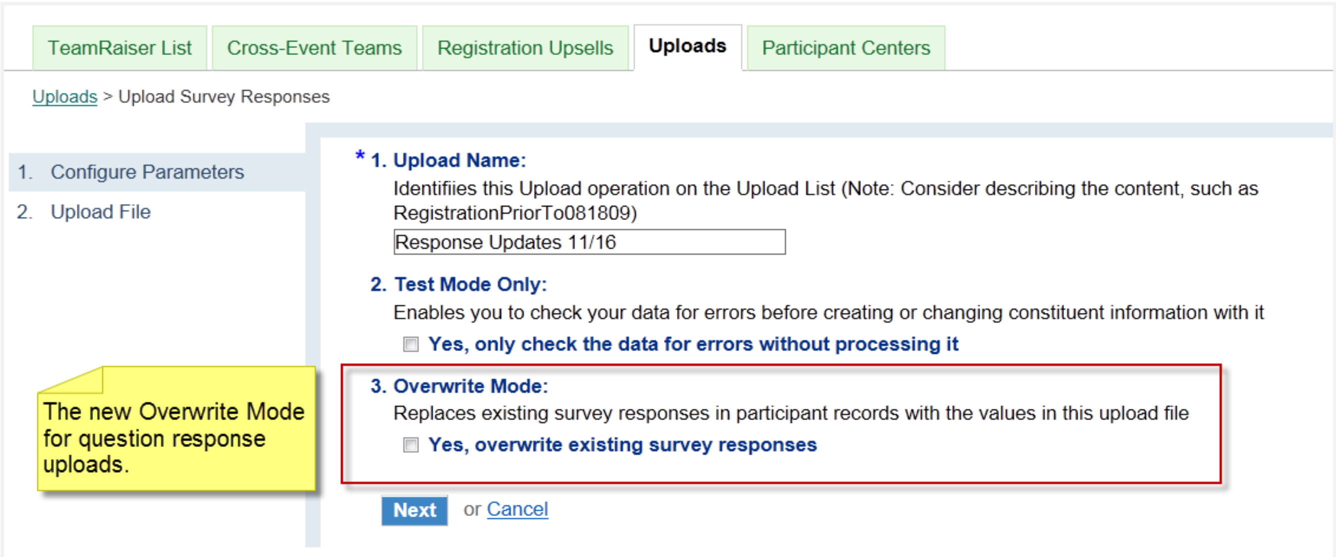
Participant Information Updates via Response Uploads

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**.



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.

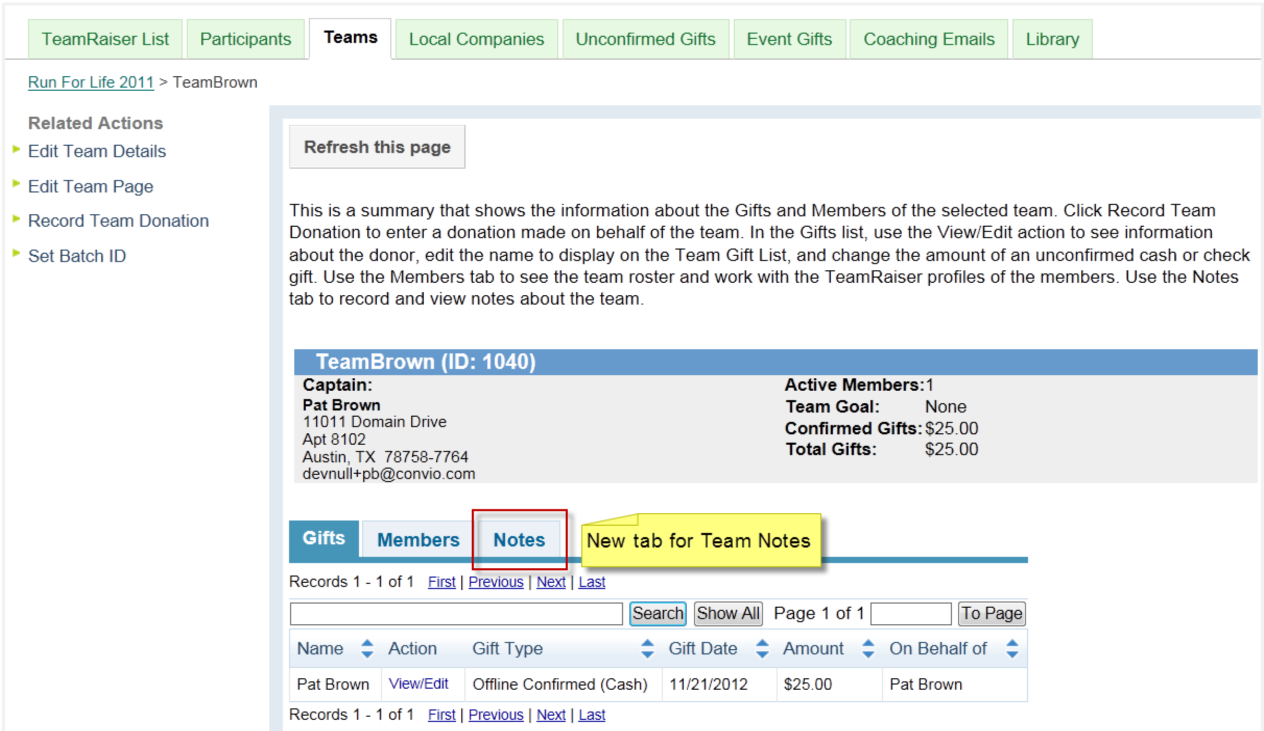
You can:

- 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

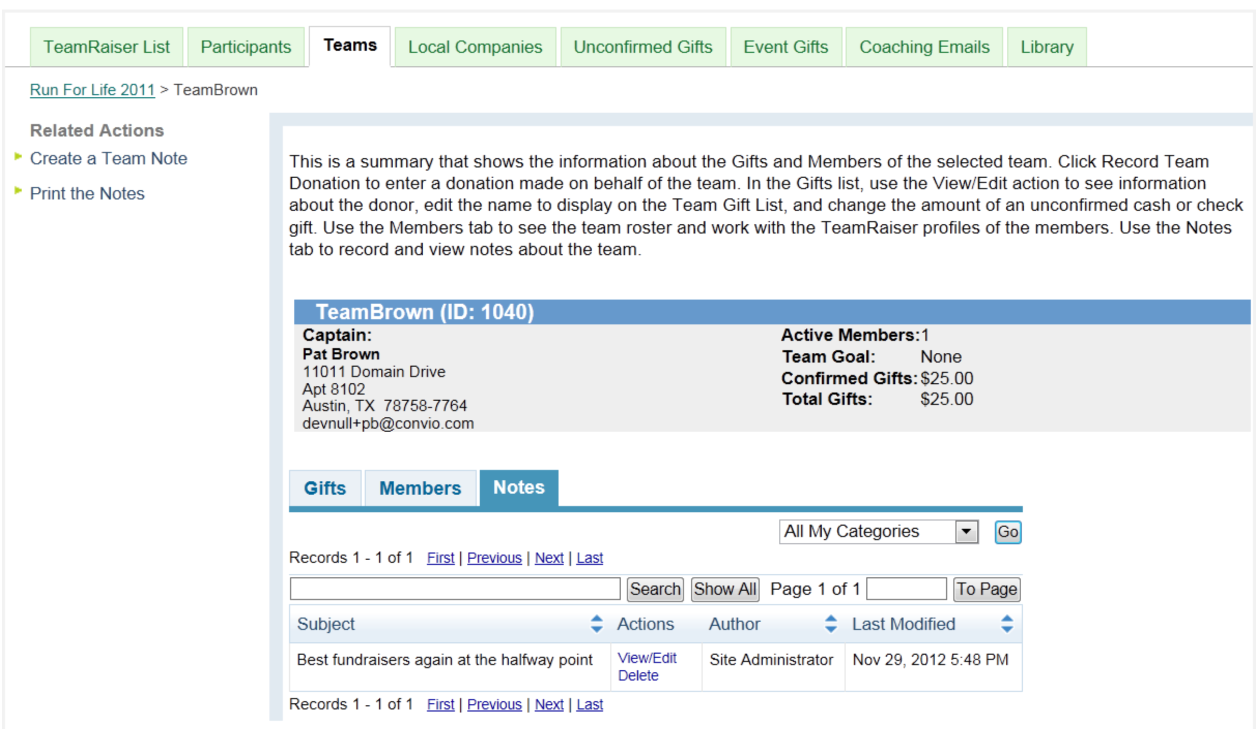
Creating a Team Note

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.



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



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.

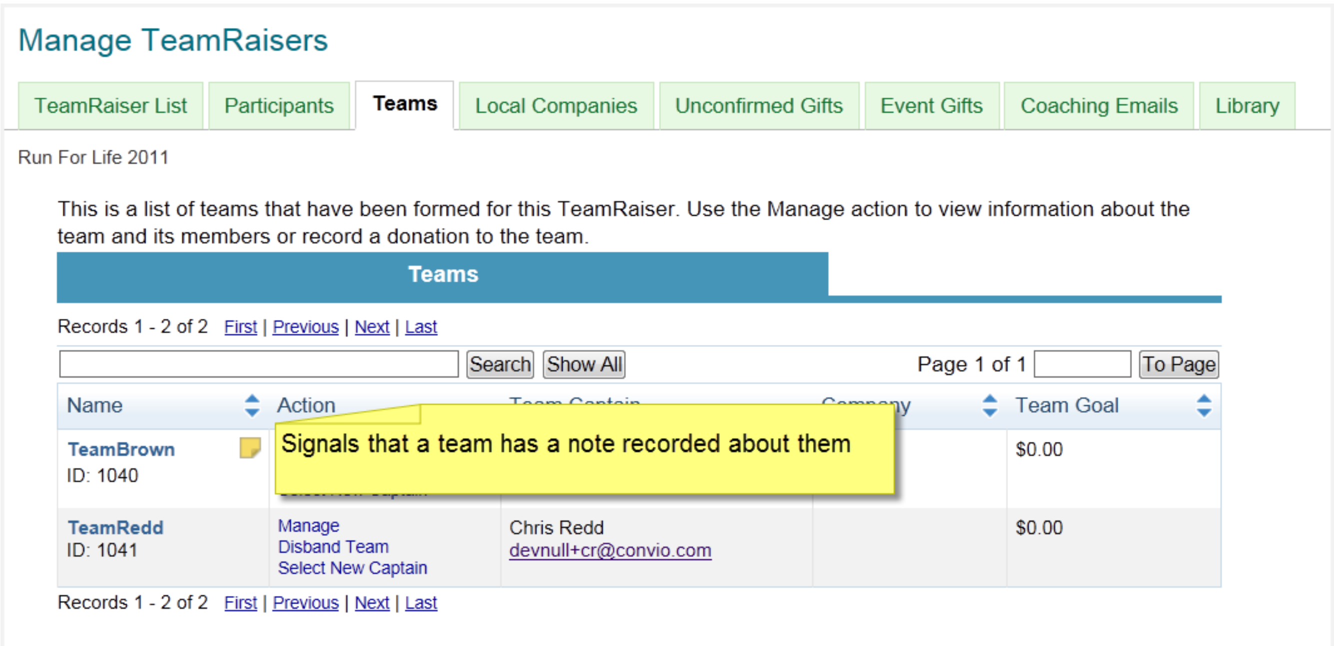
    b. Select the **Security Category** of the appropriate administrators allowed to view, edit, and print this note.

    c. In the Text area, enter the content of the note.

    d. When you are done, click **Finish**.

Identifying a Team With Notes

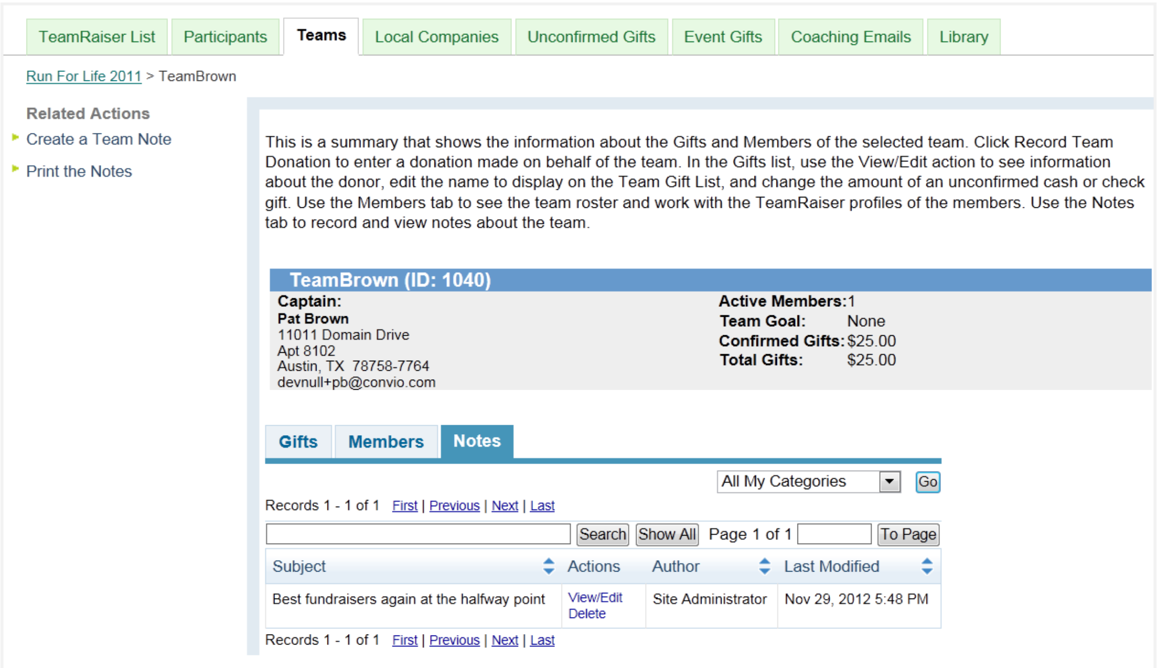
When notes have been recorded about a team, the Notes icon displays in the Teams list to the right of the team name. You can click the icon to display the list of Notes available for the team.



Reading Notes About a Team

To display the notes about a team:

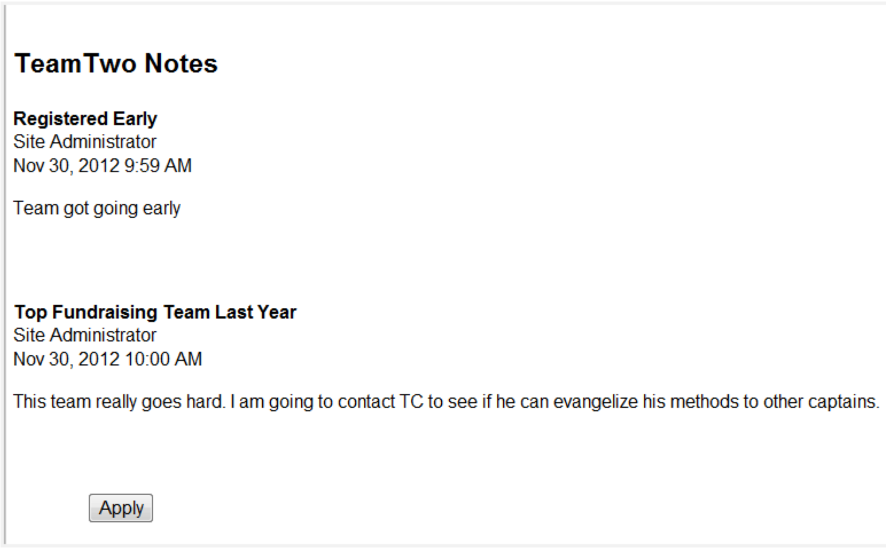
1. From the TeamRaisers list, click **Manage** from the **Actions** column of the TeamRaiser event.
2. On the Find Participant page, click the **Teams** tab.
3. On the Teams list page, click **Manage Team** from the **Actions** column of the appropriate team.
4. On the Team Details page, click the **Notes**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



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.



Self-Service PC2 Team Options

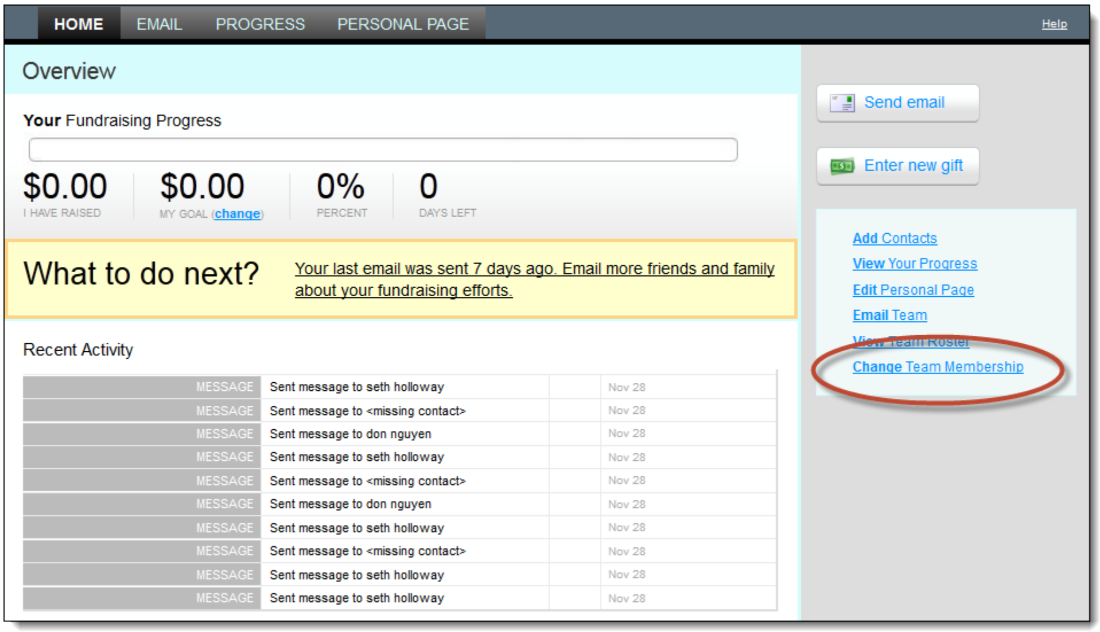
Previously, if a Participant wanted to change their team or re-register as an individual, they had to call the organization's support line and ask someone to change it. In order to reduce the amount of calls to support, new self-service options in the Participant Center that allow Participant's to:

- 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

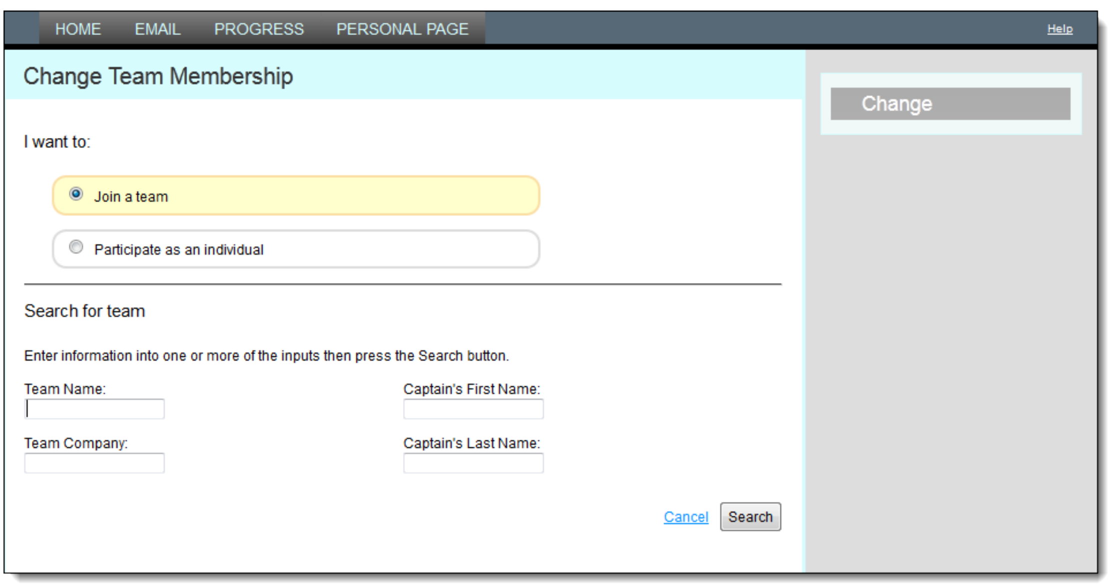
Gifts follow the Participant wherever they go, if they change teams, join a team, or leave a team and become an individual Participant.

To access the self-service options

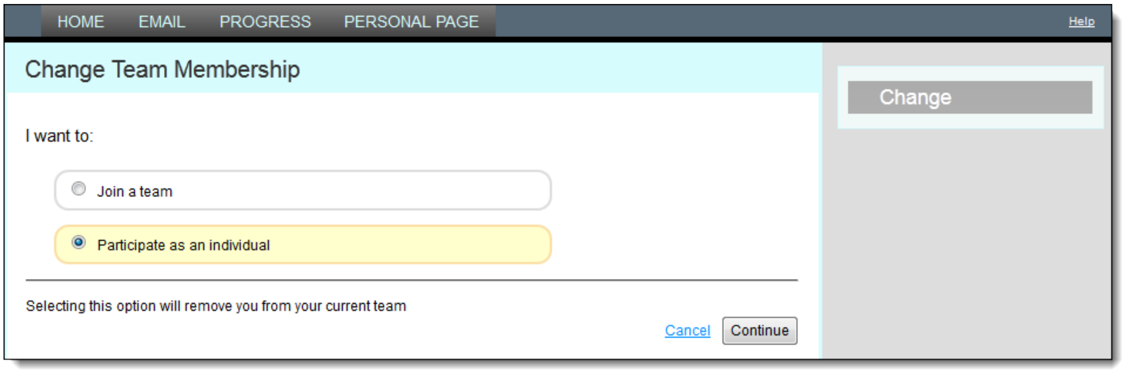
1. Login to the Participant Center.
2. Click **Change Team Membership**.



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



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



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.