Welcome to the March Spotlight on Blackbaud CRM

We will begin shortly.

The audio for this event will be broadcast through your computer.

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your passion > our purpose

Welcome to the March Spotlight on Blackbaud CRM

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ENGAGE WITH A VARIETY OF WIDGETS

Q&A

Slides

Survey

Media

Resources

Help

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Welcome!

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Today's Agenda

Version 4.0 Service Pack 1

- Recurring Giving Updates

- BB Data Warehouse Reconciliation Report

- New Queries from BB Data Warehouse

- Social Media Finder Service for WealthPoint

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Recurring Giving Updates

Payment Methods

Today's Challenge

- No first-class option for certain recurring gift payment methods

Solution Highlights

- "Cash" and "Check" as recurring gift payment method options

Skip Installments

Today's Challenge

- Too much flexibility with new 'Skip installment' option in 4.0

Solution Highlights

- Skip expected installments in specific scenarios only

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BB Data Warehouse Reconciliation Report

Today's Challenge

- Comparing item counts between transactional database and BBDW required custom scripts

Solution Highlights

- Reconcile item counts between your transactional database and BBDW
- View reconciliation exceptions

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Fortification

(v 4.0)
Service Pack 1

*Focus on usability, quality, performance,
and ongoing innovation*

v4.0 SP1

New Queries from BB Data Warehouse

Today's Challenge

- Running large, complex revenue and recognition credit queries against the transactional database can take a long time to complete
- Existing query views are complicated and hierarchical

Solution Highlights

- Two new query source views from the Blackbaud Data Warehouse
  - ❑ Revenue
  - ❑ Revenue Recognition Credits
- Faster query process time; reduced burden on transactional database
- Date part fields, enabling time-based analysis

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Social Media Finder Service for WealthPoint

Today's Challenge

- Manual effort to append social media data to constituent records
- Limited understanding of prospects' social media footprint

Solution Highlights

- Run as part of WealthPoint screenings
- Find social media data using constituents' email addresses
- New *Social Summary* tab on *Wealth and ratings* record
    - ❑ Social Media Accounts
    - ❑ Profile Images
    - ❑ Biography
    - ❑ Social Media Ratings

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Resources

➢ [New Features Guide for Blackbaud CRM v4.0 updated with Service Pack 1 features](#)

➢ [See what's new in the Blackbaud CRM SDK v4.0 Service Pack 1](#)

➢ [Watch a video about the new Social Media Finder service](#)

Survey

Please complete our short survey!

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Resources **>** Share Ideas

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Thank you!

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