Blackbaud CRM™ 4.0
Usability. Quality. Performance. Innovation.

State of the Release
March 31

An updated look at Blackbaud CRM 4.0

State of the Release is a newsletter that contains information related to Blackbaud CRM 4.0. This bi-weekly newsletter will continue through the release of Service Pack 2, with the goal of sharing information about early learnings and changes related to the release. We also encourage you to share your 4.0 experiences with others on the Upgrade Forum.

4.0 Recent and Upcoming Events

March 26
    March Spotlight
        Social Media Finder
        BBDW Enhancements
        Recurring Giving Updates

April 23
    April Spotlight

April 30
    Service Pack 2

Release Resources

Release Splash Page
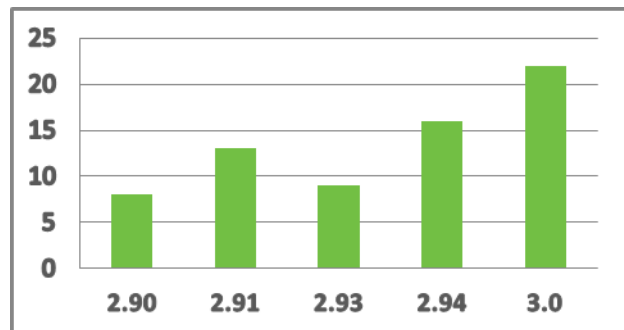
Release Resource Center

Blackbaud CRM Community

Getting Ready Datasheet

4.0 New Features Guide

Planned 4.0 Go-Lives
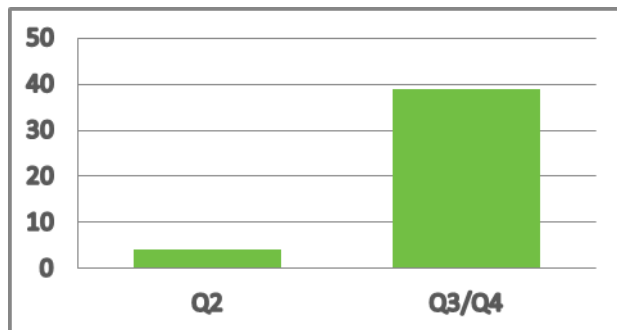
Current Version Adoption

Early Learnings

My Fundraiser Page

We have been receiving questions around changes to the **My Fundraiser Page** in Blackbaud CRM 4.0. The original plan for 4.0 was to utilize the new Tile & Tab Constituent UI for Fundraisers. During our Customer Technology Preview (CTP), we learned that some of our users preferred the see the legacy page, and wanted the **My Fundraiser Page** to remain a workspace of its own. In response to this feedback, we decided to allow fundraisers to continue using the My Fundraiser Page, and direct all others (via Search, Constituent Summary Link) to the Fundraiser tab on the Constituent record.

We've since learned that some organizations would like users to have the ability to view the **My Fundraiser Page** of other users. This comes in handy when an assistant needs to take action on behalf of a Fundraiser, or when a manager wishes to see the Fundraiser view of one of their team members. Since the legacy page still exists, you can continue using it system-wide through configuration changes in Shell Design.

Here is a short video showing how to change the **Search fundraisers** task to open a fundraiser record on the legacy page. If you wish to fully revert to the old view of fundraisers, you can also make a similar change for the "**View as fundraiser**" action on the Constituent Summary Tile Panel View Form.

Upgrading SQL Server Compatibility Level

We have identified a one-time DBA configuration task for self-hosted organizations migrating to SQL Server 2012 and SQL Server 2014. Joe Price and Michael Butler of the Support Upgrade Team have created a Gist on GitHub to share information on how to accomplish this:

How to Change Compatibility Level to SQL Server 2012 or SQL Server 2014 in a Blackbaud CRM Database

Advanced Blackbaud Data Warehouse Settings

Early testing of the BBDW has resulted in some questions about ETL performance, and we wanted to remind you of some resources that are available today for optimizing this process. The Blackbaud Developer Network contains two posts including information on how to improve ETL performance. These posts are not specific to 4.0, but they do merit repeating since many of you plan to begin using the BBDW upon upgrading.
- Optimizing ETL Performance
- BBDW Refresh/ETL Performance Hints and Tips

Known Issues

The 4.0 Known Issues report is updated on Mondays to reflect current defects in the release. When these items are resolved, they are included in the *Issues Addressed* section of our Release Notes.

Positive Feedback

Open Data Protocol (OData)

Beginning in 4.0, you can now use OData to consume, share, and manipulate data that you query from Blackbaud CRM. We have received an overwhelmingly positive response to this enhancement. If you haven't yet learned about this feature, feel free to explore the OData Walkthrough for more information.

Sticky Column Widths in Batch

In 4.0, when you resize a column width in a batch template, the adjusted width remains in place of that template until you resize it again. This request had a number of supporters in IdeaBank, and the feedback from early 4.0 testing of this change has been great. We are happy that you are enjoying this enhancement.

Service Packs

Blackbaud CRM 4.0 Service Pack 1 was released on February 23rd.

We continue to focus on creating a high quality, stable release that reduces disruptions to upgrading, while adding compelling and powerful features.

Highlights:
- Many bugs addressed, with a focus on Revenue, Batch, Data Warehouse and Sponsorship
- Introduced additional functionality in BBDW (Revenue and Revenue Recognition Queries)
- Partnered with Research Point to include Social Media Finder (view the Social Media Finder video)

Details:
- 4.0 SP1 Install
- Release Notes
- New Features Guide (with Updated SP 1 Information)

*Like what you see? Have an idea for how to make this newsletter better? Please **email** and let us know.*