New Features Guide
New Features for Blackbaud Altru 5.14

Email Itemized Receipts From Group Sales .......................................................... 3
Email Group Sales Order Balance Notifications .................................................. 5
Blackbaud Checkout ............................................................................................... 8

Before you use the new Blackbaud Altru features released in July 2019, we recommend that you review the information in this guide. It will help you and any other Altru users in your organization get the most from the enhancements we introduced.

Email Itemized Receipts From Group Sales

You can now email itemized receipts from group sales reservations. New options on the Add a payment screen allow you to choose how to print the itemized receipt at the time of entering a payment. Depending on your configuration, you can print, email, or provide no receipt. Before you can email itemized receipts, you must configure itemized receipt options. From the Sales Methods page in Tickets, select Group Sales, then select the new Itemized Receipt Options tab to choose which printing options to make available.
To enable a receipt option, expand the row and click **Mark active**. A green checkmark appears in the **Active** column for each option you make active. To disable a receipt option, expand the row and click **Mark inactive**. You cannot mark an option inactive if it is set as the default for a delivery method.

**Note:** Previously, you managed printing rules for group sales under **Tickets, Sales Documents, Itemized Receipt**. If your organization previously printed receipts for group sales, the new print receipt option will be enabled by default. Otherwise, the option will be unavailable until you mark it active.

For emailed receipts, you must also configure the email template. The template includes a customizable introduction and closing, and details about the order such as the order number, receipt date, items, prices, discounts, and total. You must enter a **Subject**, **From address**, and **From name** for the email.

**Note:** The template is shared among all sales methods — if you have already configured the email template for Daily Sales and Advance Sales, you do not need to configure it for Group Sales.

After enabling email receipts for Group Sales, a new **Receipt method** dropdown appears on a reservation's Add a payment screen.
When you select Email receipt, a dropdown appears listing any email addresses on file for the reservation contact.

You cannot update a constituent's existing email address from the Add a payment screen, but you can enter a new email address that is saved to the constituent's record. Click Add email to access the Add an email address screen.

Email Group Sales Order Balance Notifications

You can now email a copy of the group sales order balance directly from Altru. The order balance notification contains a summary of important information on the reservation, including total number of visitors, the visit date, the remaining order balance and due date, and any previous payments made.

Before you can email the order balance notification, you must configure the order balance email template. The template includes a customizable introduction and closing, as well as required fields such as a Subject, From address, and From name for the email.

From the Group Sales Setup page in Tickets, select Order balance email template.
This is an example of an order balance notification email using the default opening and closing text.
Thank you for your reservation.

Your order balance appears below. If you have any additional questions, please contact us.

**Order number 10000237**

**Order Summary**

<table>
<thead>
<tr>
<th>Patron:</th>
<th>Jillian Lewis</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reservation name:</td>
<td>ABC High School</td>
</tr>
<tr>
<td>Contact:</td>
<td>Jillian Lewis</td>
</tr>
<tr>
<td>Total visitors:</td>
<td>33</td>
</tr>
<tr>
<td>Visit date:</td>
<td>8/2/19</td>
</tr>
<tr>
<td>Arrival time:</td>
<td>9:30AM</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Balance: $100.00</th>
</tr>
</thead>
<tbody>
<tr>
<td>Due date: 7/19/19</td>
</tr>
</tbody>
</table>

As of 6/14/19 balance is 0 days past due.

**Charges**

<table>
<thead>
<tr>
<th>Name</th>
<th>Quantity</th>
</tr>
</thead>
<tbody>
<tr>
<td>Admission - Chaperone</td>
<td>1</td>
</tr>
<tr>
<td>Admission - Group Student</td>
<td>30</td>
</tr>
<tr>
<td>Admission - Teacher</td>
<td>2</td>
</tr>
<tr>
<td>Facility - Museum Cafe</td>
<td>-</td>
</tr>
<tr>
<td>Lunch</td>
<td>33</td>
</tr>
</tbody>
</table>

**Payments**

<table>
<thead>
<tr>
<th>Date</th>
<th>Payment method</th>
<th>Details</th>
<th>Amount:</th>
</tr>
</thead>
<tbody>
<tr>
<td>6/14/19</td>
<td>Check</td>
<td>check #1234, 06/01/2019</td>
<td>$100.00</td>
</tr>
</tbody>
</table>

**Balance**

- Total cost: $200.00
- Amount paid: $100.00
- Balance: $100.00

Please retain this email for your records.

You can email order balance notifications once the template is configured.

To email the notification from a group sales reservation, click **Order balance** in the **Due dates** grid on the reservation, and then click **Email order balance**. A dropdown appears listing any email addresses on file for the reservation contact.
You cannot update a constituent’s existing email address from the Email order balance screen, but you can enter a new email address that is saved to the constituent’s record. Click Add email to access the Add an email address screen.

Choose whether to group resources by resource category or resource name. Then, click Send. When you email the notice, the order balance is automatically marked as sent and an “Order Balance Sent” entry is added to the Order History page. An “Order Balance (email)” entry is also added to the Sales Documents page.

Note: You can also send the email when viewing the order balance report. This is helpful when you want to preview the information that will be included in the notification. From the reservation record, click Order balance under Tasks. Click View report to see the order balance information. Under Tasks, click Email order balance to send the notification.

Blackbaud Checkout

Now in Altru, credit card payments entered through Daily Sales or Online Sales are processed through the Blackbaud Checkout payment form. Blackbaud Checkout provides a more modern and simplified payment experience for your patrons, and supports digital wallet payment options for web forms, such as Masterpass and Visa Checkout.

Your payment forms will be updated automatically and there is no additional configuration necessary to process credit cards. However, if your organization uses Blackbaud Merchant Services, you can choose to enable digital wallet payment options for Online Sales.

Daily Sales

The steps to add a credit card payment in Daily Sales remain unchanged, with one exception. Previously when you clicked the Credit payment method, the Add a payment form showed the balance owed, amount to be paid, and fields for credit card information.
Now when you click the **Credit** payment method, you need to confirm whether the patron is paying the full order balance by credit card (or only a partial amount) before swiping or entering card details.

- To pay the full balance, on the **Add a payment** form, click **Save** or simply press **ENTER** on your keyboard.
- To only pay a partial amount, adjust the **Amount** before you **Save**.

After you confirm the amount to be paid by credit card, swipe or enter the credit card information on the new **Complete Payment** form.
After all payments are added and the balance is zero, you can complete the sale.

Online Sales

*Altru* web forms now process payments through *Blackbaud Checkout*. After the upgrade, you will see the changes immediately—there are no additional steps needed to configure the new credit card payment screen. However, if your organization processes credit cards through *Blackbaud Merchant Services*, you can choose to enable digital wallet payment solutions (such as Visa Checkout and Masterpass) to maximize convenience for your patrons. There is no additional charge to accept these payments, and these secure checkout options allow users to skip filling out lengthy forms usually associated with online credit card transactions.
Enable Digital Wallet Payment Solutions

To enable digital wallet payment solutions:

1. From Web, select **Web Payment Settings** under **Configuration**.
2. Under **Payment methods**, select the checkbox for Visa Checkout and/or Masterpass.
3. When finished, click **Save**. The new payment options appear when your patrons proceed to check out.

Note: Don't see these options? Digital wallet payment solutions are only supported by **Blackbaud Checkout** for organizations who process credit cards through **Blackbaud Merchant Services**. To learn more, visit [https://www.blackbaud.com/solutions/payment-services/merchant-services](https://www.blackbaud.com/solutions/payment-services/merchant-services).