



blackbaud®  
**DEVELOPERS’  
CONFERENCE**  
June 15–17, 2021

# Practical customizations in Blackbaud CRM

BLACKBAUD CRM™ TRACK

---

**DAVID STEPP, DAN NAPOLITANO, CARY MAYEDA**

*Session Host: Jim Ballou*



# Safe Harbor Statement

This presentation contains forward-looking statements that involve inherent risks, uncertainties and assumptions. It outlines Blackbaud's current plans and general product direction as of the date this presentation was created. Functionality described in this presentation that is not currently available is subject to change at any time, without notice, at Blackbaud's sole discretion. It does not represent a commitment to develop or release specific features within the timeframe discussed, according to the presented design, or at all. Please make any purchase decisions based on features and functionality that are currently available.



# Customization of Blackbaud Solutions

As a Blackbaud customer, your Authorized Support Contacts retain the responsibility for providing internal support for Customizations of your Blackbaud solutions by:

- Providing direct support to answer questions regarding Subscription functionality, internal business practices, and troubleshooting processes to Your Non-Authorized Users
- Providing direct support to answer questions regarding Customization specifications, features, intended usage, and Error correction and troubleshooting processes to Your Non-Authorized Users



# Providence St. Joseph Health

- Blackbaud CRM since 2019
- 5 rolling go-lives June 2019 to Feb 2021
- 30 separate databases converted to one CRM
- 39 local foundations plus regional and system levels
- Mix of full-service, large market hospitals, local rural hospitals, hospice facilities, research foundation, and future conversion of university and high school

# Why do we do this?

- Usability and Efficiency
  - Added/improved functionality
- Standardization and Consistency
  - Everyone counts things the same way
  - Create a data presentation layer
  - Create self-serve data
    - Raw/calculated/compiled data readily available rather than via query/export

# Why continued...

- But also site structure and the number of entities we support
  - We work hard for a balance of
    - Keeping all teams on the same page with workflow, code table usage etc.
    - But also maintaining flexibility between large and small shops, hospitals vs hospice etc.
  - Standard reporting and analysis methodology at system, region and local level



# How?

- Protect your developer(s)
- Training and Helpdesk
- Kanban Board
  - Business value
  - Level of effort
  - Quick wins to build trust and adoption
- Weekly Sprints



#bbdevdays

# Add Revenue Recognition Credits Customization

A CASE STUDY IN UTILIZING THE INFINITY SDK



# Add Revenue Recognition Credits

## Business Problem

Adding revenue recognition credit for past donations is labor intensive, as a recognition credit must be manually added for each revenue application.

The need to add credits for past giving occurs when adding new spouse, family foundation or privately owned business records.

Ms. Zoe Zambrano  
5/21/2021 Payment: \$100.00

**Transaction summary**

Payment amount: \$100.00      Date: 5/21/2021  
Receipt amount: \$100.00      Batch number:  
Revenue ID: rev-16113114

**Status**      **Payment method**

Acknowledgements: Not acknowledged      Payment method: Check  
Receipt preference: Per payment      Check number:  
Receipt status: Not received      Check date:  
Receipt date:  
Receipt number:  
Post status: Not posted  
Post date: 5/21/2021  
Post process ID:

Details   Benefits   Matching Gifts   Letters   Attributes   Documentation   GL Distributions   Tributes   Lockbox

**Details**

Original amount: \$100.00      Effort:  
Finder number:      Appeal:  
Source code:  
Inbound channel:  
Revenue reference:

**Application details**

**Donation - \$50.00**      [Go to revenue](#)      [Edit](#)

Designation: SYS-ISB Unrestricted  
Campaign: SYS-ISB Annual Fund Campaign  
Revenue category:  
Solicitors:  
**Recognition credits: Mr. Zach Zambrano (\$50.00); Ms. Zoe Zambrano (\$50.00)**

**Donation - \$50.00**      [Go to revenue](#)      [Edit](#)

Designation: SYS-GP Emergency Relief Funds  
Campaign:  
Revenue category:  
Solicitors:  
**Recognition credits: Ms. Zoe Zambrano (\$50.00)**

# Add Revenue Recognition Credits

## Business Problem

Adding revenue recognition credit for past donations is labor intensive, as a recognition credit must be manually added for each revenue application.

The need to add credits for past giving occurs when adding new spouse, family foundation or privately owned business records.

Ms. Zoe Zambrano  
5/21/2021 Payment: \$100.00

**Transaction summary**

Payment amount: \$100.00      Date: 5/21/2021  
Receipt amount: \$100.00      Batch number:  
Revenue ID: rev-16113114

**Status**      **Payment method**

Acknowledgements: Not acknowledged      Payment method: Check  
Receipt preference: Per payment      Check number:  
Receipt status: Not received      Check date:  
Receipt date:  
Receipt number:  
Post status: Not posted  
Post date: 5/21/2021  
Post process ID:

Details   Benefits   Matching Gifts   Letters   Attributes   Documentation   GL Distributions   Tributes   Lockbox

**Details**

Original amount: \$100.00      Effort:  
Finder number:      Appeal:  
Source code:  
Inbound channel:  
Revenue reference:

**Application details**

**Donation - \$50.00**      [Go to revenue](#)      [Edit](#)

Designation: SYS-ISB Unrestricted  
Campaign: SYS-ISB Annual Fund Campaign  
Revenue category:  
Solicitors:  
Recognition credits: Mr. Zach Zambrano (\$50.00); Ms. Zoe Zambrano (\$50.00)

**Donation - \$50.00**      [Go to revenue](#)      [Edit](#)

Designation: SYS-GP Emergency Relief Funds  
Campaign:  
Revenue category:  
Solicitors:  
Recognition credits: Ms. Zoe Zambrano (\$50.00)

# Add Revenue Recognition Credits

Buy

Add

is

ma

The

add

ow

Ms. Zoe Zambrano > Payment: \$100.00  
**5/21/2021 Donation: \$50.00**

General information		Payment information	
Amount:	\$50.00	Payment method:	Check
Date:	5/21/2021	Receipt status:	Not received
Batch number:		Post date:	5/21/2021
Acknowledgements:	Not acknowledged	Post status:	Not posted

Details Solicitors Recognition Campaigns Business units

Details Edit

Designation: SYS-ISB Unrestricted Revenue category:  
Opportunity:

Ms. Zoe Zambrano  
**5/21/2021 Payment: \$100.00**

Transaction summary

Payment amount:	\$100.00	Date:	5/21/2021
Receipt amount:	\$100.00	Batch number:	
		Revenue ID:	rev-16113114

Status

Acknowledgements:	Not acknowledged	Payment method:	Check
Receipt preference:	Per payment	Check number:	
Receipt status:	Not received	Check date:	
Receipt date:			
Receipt number:			
Post status:	Not posted		
Post date:	5/21/2021		
Post process ID:			

Details Benefits Matching Gifts Letters Attributes Documentation GL Distributions Tributes Lockbox

Details

Original amount:	\$100.00	Effort:	
Finder number:		Appeal:	
Source code:			
Inbound channel:			
Revenue reference:			

Application details

Donation - \$50.00 Go to revenue Edit

Designation:	SYS-ISB Unrestricted
Campaign:	SYS-ISB Annual Fund Campaign
Revenue category:	
Solicitors:	Recognition credits: Mr. Zach Zambrano (\$50.00); Ms. Zoe Zambrano (\$50.00)

Donation - \$50.00 Go to revenue Edit

Designation:	SYS-GP Emergency Relief Funds
Campaign:	
Revenue category:	
Solicitors:	Recognition credits: Ms. Zoe Zambrano (\$50.00)

# Add Revenue Recognition Credits

Buy  
Add  
is l  
ma  
The  
add  
ow

Ms. Zoe Zambrano > Payment: \$100.00  
**5/21/2021 Donation: \$50.00**

General information		Payment information	
Amount:	\$50.00	Payment method:	Check
Date:	5/21/2021	Receipt status:	Not received
Batch number:		Post date:	5/21/2021
Acknowledgements:	Not acknowledged	Post status:	Not posted

Details Solicitors **Recognition** Campaigns Business units

**Recognition credits (1)** [Edit recognition credits](#) [More](#)

Constituent	Amount	Type	Effective date
Ms. Zoe Zambrano	\$50.00	Donor	5/21/2021

**Named recognition (0)** [Add](#) [More](#)

Naming opportunity	Recognition name	Recognition date
--------------------	------------------	------------------

Ms. Zoe Zambrano  
**5/21/2021 Payment: \$100.00**

**Transaction summary**

Payment amount:	\$100.00	Date:	5/21/2021
Receipt amount:	\$100.00	Batch number:	
		Revenue ID:	rev-16113114

**Status**

Acknowledgements:	Not acknowledged	Payment method:	Check
Receipt preference:	Per payment	Check number:	
Receipt status:	Not received	Check date:	
Receipt date:			
Receipt number:			
Post status:	Not posted		
Post date:	5/21/2021		
Post process ID:			

Details Benefits Matching Gifts Letters Attributes Documentation GL Distributions Tributes Lockbox

**Details**

Original amount:	\$100.00	Effort:	
Finder number:		Appeal:	
Source code:			
Inbound channel:			
Revenue reference:			

**Application details**

**Donation - \$50.00** [Go to revenue](#) [Edit](#)

Designation:	SYS-ISB Unrestricted
Campaign:	SYS-ISB Annual Fund Campaign
Revenue category:	
Solicitors:	
Recognition credits:	Mr. Zach Zambrano (\$50.00); Ms. Zoe Zambrano (\$50.00)

**Donation - \$50.00** [Go to revenue](#) [Edit](#)

Designation:	SYS-GP Emergency Relief Funds
Campaign:	
Revenue category:	
Solicitors:	
Recognition credits:	Ms. Zoe Zambrano (\$50.00)

# Add Revenue Recognition Credits

Buy  
Add  
is l  
ma  
The  
add  
ow

Ms. Zoe Zambrano > Payment: \$100.00  
**5/21/2021 Donation: \$50.00**

**General information** **Payment info**

Amount: \$50.00 Payment method:  
Date: 5/21/2021 Receipt status:  
Batch number: Post date:  
Acknowledgements: Not acknowledged Post status:

Details Solicitors **Recognition** Campaigns Business

**Recognition credits (1)** Edit recognition credits

Constituent	Amount	T
Ms. Zoe Zambrano	\$50.00	C

**Named recognition (0)** + Add More

Naming opportunity	Recognition nam
--------------------	-----------------

**Edit recognition credits**

Amount: **\$50.00**

	Constituent	Recognition ...	Effective d...	Amount
	Ms. Zoe Zam...	Donor	5/21/2021	\$50.00
*				

Distribute:

Ms. Zoe Zambrano  
**5/21/2021 Payment: \$100.00**

**Transaction summary**

Payment amount: \$100.00 Date: 5/21/2021  
Receipt amount: \$100.00 Batch number:  
Revenue ID: rev-16113114  
Status: **Payment method**  
Payment method: Check  
Check number:  
Check date:

Letters Attributes Documentation GL Distributions Tributes Lockbox

Effort:  
Appeal:

to revenue Edit

restricted  
Annual Fund Campaign

Zambrano (\$50.00); Ms. Zoe Zambrano (\$50.00)

to revenue Edit

Emergency Relief Funds

Solicitors:  
Recognition credits: Ms. Zoe Zambrano (\$50.00)

# Add Revenue Recognition Credits

Buy  
Add  
is l  
ma  
The  
add  
ow

Ms. Zoe Zambrano > Payment: \$100.00  
**5/21/2021 Donation: \$50.00**

**General information** **Payment info**

Amount: \$50.00 Payment method:  
Date: 5/21/2021 Receipt status:  
Batch number: Post date:  
Acknowledgements: Not acknowledged Post status:

Details Solicitors **Recognition** Campaigns Business

**Recognition credits (1)** Edit recognition credits

Constituent	Amount	T
Ms. Zoe Zambrano	\$50.00	C

**Named recognition (0)** Add More

Naming opportunity	Recognition nam
--------------------	-----------------

Ms. Zoe Zambrano  
**5/21/2021 Payment: \$100.00**

Transaction summary

Payment amount: \$100.00 Date: 5/21/2021  
Receipt amount: \$100.00 Batch number:  
Revenue ID: rev-16113114  
Status Payment method

Constituent Search

Last/Org/Group name: Address: Search  
First name: City: Clear  
Middle name: State:   
Lookup ID: ZIP:   
Sites: All sites   
Email address:   
 Match all criteria exactly

Show advanced search options

**Results** Add

Lookup ID	Name	Constitue...	Address	City	State	ZIP	Email add...	Middle na...
-----------	------	--------------	---------	------	-------	-----	--------------	--------------

Help Select Cancel

# Add Revenue Recognition Credits

Buy  
Add  
is l  
ma  
The  
add  
ow

Ms. Zoe Zambrano > Payment: \$100.00  
**5/21/2021 Donation: \$50.00**

**General information** **Payment info**

Amount: \$50.00 Payment method:  
Date: 5/21/2021 Receipt status:  
Batch number: Post date:  
Acknowledgements: Not acknowledged Post status:

Details Solicitors **Recognition** Campaigns Business

**Recognition credits (1)** Edit recognition credits

Constituent	Amount	T
Ms. Zoe Zambrano	\$50.00	C

**Named recognition (0)** Add More

Naming opportunity	Recognition nam
--------------------	-----------------

Ms. Zoe Zambrano  
**5/21/2021 Payment: \$100.00**

Transaction summary

Payment amount: \$100.00 Date: 5/21/2021  
Receipt amount: \$100.00 Batch number:  
Revenue ID: rev-16113114  
Status Payment method

**Constituent Search**

Last/Org/Group name: Address: Search  
First name: City: Clear  
Middle name: State:   
Lookup ID: con-11115959 ZIP:   
Sites: All sites   
Email address:   
 Match all criteria exactly

Show advanced search options

**Results** Add

Lookup ID	Name	Constitue...	Address	City	State	ZIP	Email add...	Middle na...
-----------	------	--------------	---------	------	-------	-----	--------------	--------------

Help Select Cancel

# Add Revenue Recognition Credits

Ms. Zoe Zambrano > Payment: \$100.00  
**5/21/2021 Donation: \$50.00**

**General information** **Payment info**

Amount: \$50.00 Payment method:  
Date: 5/21/2021 Receipt status:  
Batch number: Post date:  
Acknowledgements: Not acknowledged Post status:

Details Solicitors **Recognition** Campaigns Business

**Recognition credits (1)** Edit recognition credits

Constituent	Amount	T
Ms. Zoe Zambrano	\$50.00	D

**Named recognition (0)** Add More

Naming opportunity	Recognition nam
--------------------	-----------------

Ms. Zoe Zambrano  
**5/21/2021 Payment: \$100.00**

**Transaction summary**

Payment amount: \$100.00 Date: 5/21/2021  
Receipt amount: \$100.00 Batch number:  
Revenue ID: rev-16113114  
Status: Payment method:

**Constituent Search**

Last/Org/Group name: Address: Search  
First name: City: Clear  
Middle name: State:   
Lookup ID: con-11115959 ZIP:   
Sites: All sites   
Email address:   
 Match all criteria exactly

Show advanced search options

**Results (1 record found)** Add

Lookup ID	Name	Constitue...	Address	City	State	ZIP	Email add...	Middle na...
con-11115...	Zambrano, Zach	Individual	1234 Main...	Seattle	Washington	98108	zach.zamb...	

Help Select Cancel



# Add Revenue Recognition Credits

Ms. Zoe Zambrano > Payment: \$100.00  
**5/21/2021 Donation: \$50.00**

**General information** **Payment info**

Amount: \$50.00 Payment method:  
Date: 5/21/2021 Receipt status:  
Batch number: Post date:  
Acknowledgements: Not acknowledged Post status:

Details Solicitors **Recognition** Campaigns Business

**Recognition credits (1)** Edit recognition credits

Constituent	Amount	T
Ms. Zoe Zambrano	\$50.00	D

**Named recognition (0)** + Add More

Naming opportunity	Recognition nam
--------------------	-----------------

**Edit recognition credits**

Amount: **\$50.00**

Constituent	Recognition ...	Effective d...	Amount
Ms. Zoe Zam...	Donor	5/21/2021	\$50.00
Mr. Zach Za...			\$0.00
*			

Distribute: Evenly

Ms. Zoe Zambrano  
**5/21/2021 Payment: \$100.00**

**Transaction summary**

Payment amount: \$100.00 Date: 5/21/2021  
Receipt amount: \$100.00 Batch number:  
Revenue ID: rev-16113114  
Status: **Payment method**

State	ZIP	Email add...	Middle na...
Washington	98108	zach.zamb...	

# Add Revenue Recognition Credits

Ms. Zoe Zambrano > Payment: \$100.00  
**5/21/2021 Donation: \$50.00**

**General information** | **Payment info**

Amount: \$50.00 | Payment method:  
Date: 5/21/2021 | Receipt status:  
Batch number: | Post date:  
Acknowledgements: Not acknowledged | Post status:

Details | Solicitors | **Recognition** | Campaigns | Business

**Recognition credits (1)** | Edit recognition credits

Constituent	Amount	Tax
Ms. Zoe Zambrano	\$50.00	D

**Named recognition (0)** | + Add | More

Naming opportunity	Recognition name

**Edit recognition credits**

Amount: **\$50.00** | Reset recognition credits

Constituent	Recognition ...	Effective d...	Amount
Ms. Zoe Zam...	Donor	5/21/2021	\$50.00
Mr. Zach Za...			\$0.00
*			

Distribute: Evenly | Apply

Help | Save | Cancel

State | ZIP | Email add... | Middle na...  
Washington | 98108 | zach.zamb... |

Help | Select | Cancel

# Add Revenue Recognition Credits

The image shows a sequence of steps in a software interface. The background window displays a donation record for Ms. Zoe Zambrano, dated 5/21/2021, for \$50.00. The 'Recognition' tab is selected, showing one recognition credit for Ms. Zoe Zambrano. A blue arrow points from the 'Edit recognition credits' button to a modal window titled 'Edit recognition credits'. This modal window shows a table with two rows: one for Ms. Zoe Zambrano (Donor, \$50.00) and one for Mr. Zach Zambrano (Spouse/Partner, \$50.00). A 'Distribute' dropdown is set to 'Evenly'. Another blue arrow points from the 'Add' button in the background window to a search table in the foreground window. This table has columns for State, ZIP, Email address, and Middle name, with the entry 'Washington 98108 zach.zamb...' selected. A third blue arrow points from the 'Add' button in the background window to the 'Add' button in the foreground window.

**Ms. Zoe Zambrano > Payment: \$100.00**  
**5/21/2021 Donation: \$50.00**

**General information**  
Amount: \$50.00  
Date: 5/21/2021  
Batch number:  
Acknowledgements: Not acknowledged

**Payment info**  
Payment method:  
Receipt status:  
Post date:  
Post status:

Details | Solicitors | **Recognition** | Campaigns | Business

**Recognition credits (1)** Edit recognition credits

Constituent	Amount
Ms. Zoe Zambrano	\$50.00

**Named recognition (0)** Add More

Naming opportunity	Recognition name
--------------------	------------------

**Edit recognition credits**

Amount: **\$50.00** Reset recognition credits

Constituent	Recognition ...	Effective d...	Amount
Ms. Zoe Zam...	Donor	5/21/2021	\$50.00
Mr. Zach Za...	Spouse/Partn...	5/21/2021	\$50.00
*			

Distribute: Evenly Apply

Help Save Cancel

**Search**  
**Clear**

State	ZIP	Email add...	Middle na...
Washington	98108	zach.zamb...	

Add

Select Cancel

# Add Revenue Recognition Credits

Buy  
Add  
is l  
ma  
The  
add  
ow

Ms. Zoe Zambrano > Payment: \$100.00  
**5/21/2021 Donation: \$50.00**

General information		Payment information	
Amount:	\$50.00	Payment method:	Check
Date:	5/21/2021	Receipt status:	Not received
Batch number:		Post date:	5/21/2021
Acknowledgements:	Not acknowledged	Post status:	Not posted

Details | Solicitors | **Recognition** | Campaigns | Business units

**Recognition credits (2)** Edit recognition credits More

Constituent	Amount	Type	Effective date
Mr. Zach Zambrano	\$50.00	Spouse/Partner	5/21/2021
Ms. Zoe Zambrano	\$50.00	Donor	5/21/2021

**Named recognition (0)** Add More

Naming opportunity	Recognition name	Recognition date
--------------------	------------------	------------------

Ms. Zoe Zambrano  
**5/21/2021 Payment: \$100.00**

Transaction summary

Payment amount:	\$100.00	Date:	5/21/2021
Receipt amount:	\$100.00	Batch number:	
		Revenue ID:	rev-16113114

Status | Payment method

Reset recognition credits

Effective d...	Amount
5/21/2021	\$50.00
5/21/2021	\$50.00

Evenly Apply

Save Cancel

Search

Clear

+ Add

State	ZIP	Email add...	Middle na...
Washington	98108	zach.zamb...	

Select Cancel

# Add Revenue Recognition Credits

## High-Level Requirements

- As a user I am able to add missing recognition credits to a revenue recognition default recipient's record en masse.
- As a user I am able to specify the source and recipient constituents, and the gifts to credit based on gift date, transaction type, and site.
- As a user I am able to specify the recognition type and match factor for the recognition credits added (default values based on revenue recognition default).
- Only a single user can add recognition credits at a time for a given revenue recognition default.

# Add Revenue Recognition Credits

## Design Process

- Initially considered using a UI Model Add form
- Collection object presents some UX challenges

Plan type: Major Giving Site: Providence Portland Medical Foundation Outlines:  Add steps from plan outline

Steps

Select all Clear all Update status to:

	Expected date	Objective	Owner	Stage	Status	Actual date	Contact method	Category	Subcategory	Additional solicitors
	5/25/2021	Assess as p...	Ms. Zoe Za...	Qualification	Planned		Task			
	6/8/2021	Determine ...	Ms. Zoe Za...	Cultivation	Planned		Personal Visit			
	6/15/2021	Cultivation ...	Ms. Zoe Za...	Cultivation	Planned		Personal Visit			
	6/22/2021	Make ask	Ms. Zoe Za...	Solicitation	Planned		Personal Visit			
	6/24/2021	Acknowled...	Ms. Zoe Za...	Stewardship	Planned		Mail			
*										

Adjust expected dates:



#bbdevdays

# Add Revenue Recognition Credits Customization

## DEMO



# Add Revenue Recognition Credits

## Page Anatomy

**Recognition default**

Source constituent: Ms. Zoe Zambrano  
Recipient constituent: Mr. Zach Zambrano  
Recognition type: Spouse/Partner

Start date:                      Match factor: 100.00  
End date:

**Steps**

1. Select the revenue records to add a recognition credit by using the datalist on the left.
2. Once the desired revenue records are all displayed on the right, click the Add recognition credits for selected revenue records button.

**View Data Form**

Date	Amount	Transaction	Application	Detail	Category	Appeal	Campaigns
5/21/2021	\$50						
8/9/2019	\$42						
8/5/2019	\$100						
7/26/2019	\$42						
7/12/2019	\$42						
6/28/2019	\$42						
6/14/2019	\$42						
6/3/2019	\$75						
6/3/2019	\$75						
6/3/2019	\$1,100						
5/31/2019	\$42						
5/31/2019	\$42						
5/17/2019	\$42						
5/17/2019	\$42						
5/3/2019	\$42						
5/3/2019	\$42						
4/19/2019	\$42						
4/19/2019	\$42						
4/5/2019	\$42						
4/5/2019	\$42						
3/22/2019	\$42						
3/22/2019	\$42						
3/8/2019	\$42						
3/8/2019	\$42						
2/22/2019	\$42						

```
<PageActionGroup ID="cddb39d4-63c3-49db-80a3-0c86f97342c3" Caption="DREAM Knowledgebase">  
  <Actions>  
    <Action ID="85802d86-0909-4cd7-8007-949335539598" Caption="Add Recognition Credit (soft credit) from past Revenue" ImageKey="CATALOG:PSJH.CustomFx.CommonAsset">  
      <ExecuteCLRAction xmlns="bb appfx commontypes">  
        <ScriptIdentifier Url="browser/htmlforms/programming/OpenWebPageAction.js" ObjectName="BBUI.customactions.programming.OpenWebPageAction">  
          <StaticParameters>  
            <ParameterList>  
              <Param ID="URL">  
                <Value>https://dreamhelp.providence.org/hc/en-us/articles/1500004683062-Add-Recognition-Credit-soft-credit-from-past-Revenue/</Value>  
              </Param>  
            </ParameterList>  
          </StaticParameters>  
        </ScriptIdentifier>  
      </ExecuteCLRAction>  
    </Action>  
  </Actions>  
  <RenderLocation>  
    <Tab ID="0c04f796-9285-4bf3-a4bd-9b0e80618a50" />  
  </RenderLocation>  
</PageActionGroup>
```

Summary Section  
UI Model  
View Data Form  
Custom UI Model Form

Single Tab

Page Action Group

Data List



# Add Revenue Recognition Credits

## Record Locking

**Add Recognition Credits to Zach Zambrano from Revenue given by Zoe Zambrano**

**Recognition default**

Source constituent: Ms. Zoe Zambrano      Start date:      Match factor: 100.00  
Recipient constituent: Mr. Zach Zambrano      End date:  
Recognition type: Spouse/Partner

**Steps**

1. Select the revenue records to add a recognition credit by using the datalist on the left.
2. Once the desired revenue records are all displayed on the right, click the **Add recognition credits for selected revenue records** button.

Select all revenue

**Revenue given by Zoe Zambrano without recognition credits to Zach Zambrano**

Group by: Commitment    Type: All    Date range:  
Sites: All sites    Start date: mm/dd/yyyy    End date:

Date	Amount	Balance	Transaction	Application
6/3/2019	\$75.00		Payment	Donation
6/3/2019	\$75.00		Payment	Donation
6/3/2019	\$1,100.00		Payment	Donation
1/14/2019	\$1,000.00		Payment	Donation

**XML Schema Snippets:**

```
<Fields>  
  <ForeignKeyField Name="REVENUERECOGNITIONDEFAULTID" ForeignTable="REVENUERECOGNITIONDEFAULT" Required="true" />  
  <ForeignKeyField Name="APPUSERID" ForeignTable="APPUSER" Required="true" Cardinality="ManyToOne" OnDelete="Ca" />  
</Fields>  
  
<Indexes>  
  <Index IsUnique="true">  
    <IndexFields>  
      <IndexField Name="REVENUERECOGNITIONDEFAULTID" />  
    </IndexFields>  
  </Index>  
</Indexes>
```

manage lock  
acquisition/failure

```
create procedure dbo.USR_PSJH_USP_RECOGNITIONCREDITADDFROMREVENUELOCKACQUIRE
```

```
(  
    @REVENUERECOGNITIONDEFAULTID C72F456A-5249-450A-88EF-37902CAA7DC2 (Zoe's recognition default to Zach)  
    @APPUSERID uniqueidentifier, BA1B4A9E-9E1E-47D8-822C-DC873D29A50C (David's APPUSERID)  
    @LOCKACQUIRED bit output  
)
```

```
as  
begin  
    declare @changeAgentId uniqueidentifier  
    exec dbo.USB_CHANGEAGENT_GETORCREATECHANGEAGENT @changeAgentId output
```

```
    declare @currentDateTime datetime  
    set @currentDateTime = getdate()
```

```
    set @LOCKACQUIRED = 0
```

```
    begin try
```

```
        if exists (select 1 from dbo.USR_PSJH_RECOGNITIONCREDITADDFROMREVENUELOCK where REVENUERECOGNITIONDEFAULTID = @REVENUERECOGNITIONDEFAULTID and APPUSERID = @APPUSERID)
```

```
        begin  
            set @LOCKACQUIRED = 1  
        end
```

```
        else  
        begin  
            insert dbo.USR_PSJH_RECOGNITIONCREDITADDFROMREVENUELOCK (REVENUERECOGNITIONDEFAULTID, APPUSERID, ADDEDBYID, CHANGEDBYID, DATEADDED, DATECHANGED)  
            select  
                @REVENUERECOGNITIONDEFAULTID,  
                @APPUSERID,  
                @changeAgentId,  
                @changeAgentId,  
                @currentDateTime,  
                @currentDateTime  
  
            set @LOCKACQUIRED = 1  
        end
```

```
    end try  
    begin catch  
        set @LOCKACQUIRED = 0  
    end catch
```

USR\_PSJH\_RECOGNITIONCREDITADDFROMREVENUELOCK

	ID	REVENUERECOGNITIONDEFAULTID	APPUSERID
1	74DBC092-A2DA-4AC8-837B-8EEABF513AAB	C72F456A-5249-450A-88EF-37902CAA7DC2	BA1B4A9E-9E1E-47D8-822C-DC873D29A50C

```
    return 0;
```

```
end
```



# Add Revenue Recognition Credits

## User Feedback

I love this function! I think I use it multiple times daily. Updating recognition credit had always been a bit of a chore when connecting spouses with existing constituent records, but now it is so simple.

I really can't express how much I appreciate this function. Each time I use it, I think of how much time I'd be spending on updating recognition without it.



#bbdevdays

# Catalog Browser Enhancement

DEVELOPER TOOL

# Catalog Browser Enhancement

## Overview

- As an admin I can search for any spec that has been loaded to the database
- As an admin I can view/download any spec that has been loaded to the database
- As an admin I can unload any spec that has been loaded to the database (with some exceptions)



#bbdevdays

# Catalog Browser Enhancement

## DEMO

# Catalog Browser Enhancement

## Key elements

- The Data List selects from all the individual catalog tables

```
select ID, null, NAME, DESCRIPTION, 2, 'DataList', DATAListSpec.value('declare namespace ns="bb_appfx_dataList"; (ns:DataListSpec/@Author)[1]', 'nvarchar(max)'), ADDEDBYID, DATEADDED, CHANGEDBYID, DATECHANGED from dbo.DATALISTCATALOG
union all
select ID, null, NAME, DESCRIPTION, 43, 'FeatureGroup', SPEcXML.value('declare namespace ns="bb_appfx_featureGroup"; (ns:FeatureGroupSpec/@Author)[1]', 'nvarchar(max)'), ADDEDBYID, DATEADDED, CHANGEDBYID, DATECHANGED from dbo.FEATUREGROUPCATALOG
union all
select ID, null, NAME, DESCRIPTION, 4, 'FunctionalArea', FUNCTIONALAREASPEcXML.value('declare namespace ns="bb_appfx_functionalArea"; (ns:FunctionalAreaSpec/@Author)[1]', 'nvarchar(max)'), ADDEDBYID, DATEADDED, CHANGEDBYID, DATECHANGED from dbo.FUNCTIONALAREACATALOG
union all
select ID, null, GLOBALCHANGESPEcXML.value('declare namespace ns="bb_appfx_globalChange"; (ns:GlobalChangeSpec/@Name)[1]', 'nvarchar(max)'), DESCRIPTION, 28, 'GlobalChange', GLOBALCHANGESPEcXML.value('declare namespace ns="bb_appfx_globalChange"; (ns:GlobalChangeSpec/@Name)[1]', 'nvarchar(max)'), ADDEDBYID, DATEADDED, CHANGEDBYID, DATECHANGED from dbo.GLOBALCHANGESPEcXML
union all
select ID, null, NAME, DESCRIPTION, 21, 'IDMapper', IDMAPPEcXML.value('declare namespace ns="bb_appfx_idMapper"; (ns:IDMapperSpec/@Author)[1]', 'nvarchar(max)'), ADDEDBYID, DATEADDED, CHANGEDBYID, DATECHANGED from dbo.IDMAPPEcXML
union all
select ID, null, NAME, DESCRIPTION, 25, 'KPI', SPEcXML.value('declare namespace ns="bb_appfx_kpi"; (ns:KpiSpec/@Author)[1]', 'nvarchar(max)'), ADDEDBYID, DATEADDED, CHANGEDBYID, DATECHANGED from dbo.KPICATALOG
```

```
public enum CatalogItemType
{
    AddDataFormTemplateSpec,
    CodeTableSpec,
    DataListSpec,
    EditDataFormTemplateSpec,
    FunctionalAreaSpec,
    PackageSpec,
    PageDefinitionSpec,
    QueryViewSpec,
    QueryViewSpecExtension,
    ReportSpec,
    SearchListSpec,
    SimpleDataListSpec,
    SmartQuerySpec,
    SQLFunctionSpec,
    SQLStoredProcedureSpec,
    TableSpec,
    TableSpecExtension,
    TaskSpec,
    TranslationFunctionSpec,
    ViewDataFormTemplateSpec,
    BatchTypeSpec,
    IDMapperSpec,
    BusinessProcessSpec,
    RecordOperationSpec,
    FlashDashSpec,
    KpiSpec,
    MergeTaskSpec,
    SmartFieldSpec,
    GlobalChangeSpec,
    WebDashboardPageSpec,
    SystemPrivilegeSpec,
    ConfigurationDataSpec,
    BatchTypeExtensionSpec,
    MapEntitySpec,
    DataFormAddInSpec,
    WorkflowSpec,
    CustomUIModeMetadata,
    CalendarSpec,
    RelationshipMapSpec,
    UIWidgetSpec,
    WorkflowInboxSpec,
    SQLViewSpec,
    TaskWizardSpec,
    FeatureGroupSpec,
    BatchTypeAddInSpec,
    WebPageModeISpec
}
```



# Catalog Browser Enhancement

## Key elements

- The Data List selects from all the individual catalog tables
- View XML and Unload Spec actions require a spec type enumeration found in `Blackbaud.AppFx.XmlTypes.CatalogItemType`
- The Unload Spec Record Operation calls the Blackbaud CLR stored procedure `USP_UNLOADSPEC`  
*USP\_UNLOADSPEC is the sproc called by the UnloadSpec method in the SpecLoader class contained in the Blackbaud.AppFx.SpecHelpers assembly, which is called by LoadSpec.exe*

```
public enum CatalogItemType
{
    AddDataFormTemplateSpec,
    CodeTableSpec,
    DataListSpec,
    EditDataFormTemplateSpec,
    FunctionalAreaSpec,
    PackageSpec,
    PageDefinitionSpec,
    QueryViewSpec,
    QueryViewSpecExtension,
    ReportSpec,
    SearchListSpec,
    SimpleDataListSpec,
    SmartQuerySpec,
    SQLFunctionSpec,
    SQLStoredProcedureSpec,
    TableSpec,
    TableSpecExtension,
    TaskSpec,
    TranslationFunctionSpec,
    ViewDataFormTemplateSpec,
    BatchTypeSpec,
    IDMapperSpec,
    BusinessProcessSpec,
    RecordOperationSpec,
    FlashDashSpec,
    KpiSpec,
    MergeTaskSpec,
    SmartFieldSpec,
    GlobalChangeSpec,
    WebDashboardPageSpec,
    SystemPrivilegeSpec,
    ConfigurationDataSpec,
    BatchTypeExtensionSpec,
    MapEntitySpec,
    DataFormAddInSpec,
    WorkflowSpec,
    CustomUIModeIMetadata,
    CalendarSpec,
    RelationshipMapSpec,
    UIWidgetSpec,
    WorkflowInboxSpec,
    SQLViewSpec,
    TaskWizardSpec,
    FeatureGroupSpec,
    BatchTypeAddInSpec,
    WebPageModeISpec
}
```



# Catalog Browser Enhancement

## Unload Spec Record Operation

```
1 <RecordOperationSpec
2   xmlns="bb_appfx_recordoperation"
3   xmlns:c="bb_appfx_commontypes"
4   ID="c4f2106c-6828-4d99-8a6b-08e2f80b18cf"
5   Name="Unload Spec Record Operation"
6   Description="Unload a spec from the database"
7   Author="PSJH\Cary Mayeda"
8   OperationType="Delete"
9   RecordType="SDK Spec"
10  c:SecurityUIFolder="DREAM Information Services\Administration"
```

This utilizes the Blackbaud CLR sproc USP\_UNLOADSPEC, which is the sproc that is called when you unload a spec using "loadspect.exe /u".

It takes three parameters:

@SPECTYPE	int	This is a zero based enumeration of spec types (see "Catalog Browser - All Loaded Specs Data List")
@SPECID	uniqueidentifier	The ID of the spec to unload
@CHANGEAGENTID	uniqueidentifier	

Note: USP\_UNLOADSPEC requires the call to be wrapped in a transaction

```
30 create procedure dbo.USR_PSJH_USP_RECORDOPERATION_UNLOADSPEC
31 (
32   @ID nvarchar(40),
33   @CHANGEAGENTID uniqueidentifier
34 )
35 as begin
36   if @CHANGEAGENTID is null
37     exec dbo.USP_CHANGEAGENT_GETORCREATECHANGEAGENT @CHANGEAGENTID output;
38
39   declare @SpecID uniqueidentifier
40   declare @SpecType int
41
42   begin try
43     set @SpecID = cast (substring(@ID, 1, 36) as uniqueidentifier)
44     set @SpecType = cast (substring(@ID, 38, 3) as int)
45
46     begin transaction
47     exec dbo.USP_UNLOADSPEC @SpecType, @SpecID, @CHANGEAGENTID
48     commit transaction
49   end try
50   begin catch
51     if @@TRANCOUNT > 0
52       rollback transaction
53
54     exec dbo.USP_RAISE_ERROR;
55     return 1;
56   end catch
57
58   return 0;
59
60 end
61 ]]>
62 </c:CreateProcedureSQL>
63 </SPOperationImplementation>
64 </SPRecord>
```

```
begin transaction
exec dbo.USP_UNLOADSPEC @SpecType, @SpecID, @CHANGEAGENTID
commit transaction
```

# Catalog Browser Enhancement

## Things to note

- Some specs like batch extensions take too long to unload and timeout. I chose not to increase the timeout, since these can take hours.
- USP\_UNLOADSPEC does not currently support unloading Query View Extension specs
- The spec types that are not included yet in my code are:
  - TableSpecExtension
  - CustomUIModelMetadata
  - WorkflowInboxSpec
  - WebPageModelSpec

# Catalog Browser Enhancement

## Things to note

- SystemPrivilege does not store the XML spec in the catalog table, so the View XML action is disabled

[cary.mayeda@providence.org](mailto:cary.mayeda@providence.org)



# Hello! I'm Dan Napolitano

*He/They/Him/Them*

---

## AT PSJH FOUNDATION: 2 YEARS

10 years in private sector at Liberty Mutual in roles as reporting analyst, systems analyst, and manager of QA team for their e-commerce website.

10 years in non-profit at Portland State University Foundation and now Providence St. Joseph Health Foundation in roles as report analyst, Director of Reporting and Analytics, and CRM developer.



## Problem: Easy Data Access

- Make access to data easy but flexible.
- Replace list-based export 'reports' with in-client presented lists.
- Deliver quickly without adding the feeling of clutter to CRM.
- Design keeping in mind future CRM growth and vision.



# Solution: Foundation Hub

- Start with list builders but allow for future BI/report options:
  - Familiar functionality.
  - Flexible sort, filter, column preferences, export.
- Gain adoption across business units by diversifying list types:
  - Funds; Events; Interactions; Communications; Assigned Prospects; Plans.
- Implement as new functional area:
  - Functional area effectively is a page spec.
  - Functional area task performs 'ShowPage' where header attribute `IsFunctionalAreaDefault="true"`
- Intent to reduce functional areas over time in order to lessen the feeling of clutter.

# Solution: Layout

The screenshot displays the PSJH Foundation Hub interface. At the top, a navigation bar includes links for Home, PSJH Foundation Hub, Constituents, Marketing Administration, Communications Center, Revenue, Events, Memberships, Prospects, Volunteers, Fundraising, Treasury, and Analysis. On the left, a sidebar contains sections for Get Help (DREAM Knowledgebase), Common searches (PSJH constituent search, Event search, Revenue search), Shortcuts (Add this page to shortcuts, Manage my shortcuts, Catalog Browser, Information Library), and Recent searches (Transaction search, PSJH constituent search, Campaign search, Purpose search). The main content area features a 'Global filter' section with a 'Sites' dropdown menu set to 'All sites'. Below this, a yellow filter area contains a 'Manager's Sites' dropdown menu also set to 'All sites', along with 'Prospect Status', 'Prospect Manager', and an 'Also include if on prospect team' checkbox. A red box highlights the 'Global filter' section, and another red box highlights the 'Manager's Sites' dropdown. A red arrow points from the 'Global filter' box to the 'Manager's Sites' dropdown, and another red arrow points from the 'Manager's Sites' dropdown to the 'SiteHierarchyFilterHelper' text on the right. The text 'SiteHierarchyFilterHelper' is written in red. Below the filter area, there are tabs for Funds, Interactions, Communications, Events, Major Giving, Grants, Donors, and Revenue. The 'Assigned Prospects' section shows 47 prospects and includes an 'Add a Prospect' button and a 'More' dropdown. At the bottom, there are columns for Prospect Name, Prospect Manager, Prospect Status, Prospect Team, Last Interaction, Last Contact, Next Step, Has Active..., Constituent..., and Revenue Co... with a pagination control showing page 1 of 3.

SiteHierarchyFilterHelper

# Solution: Plans Tab with List builder

Funds Interactions Communications Events Major Giving Grants Donors Revenue

Assigned Prospects Prospect Plans

**Prospect Plans (5)** + Add a Prospect Plan More ▾

Plan's Site: Selected sites ▾  Include Inactive

Plan Manager:   Also include plans for manager's prospects

Apply Reset

+ Columns ▾ Clear all filters

Plan Name	Plan Activity...	Last St...	Next S...	Plan Type	Plan Status	Pending Ask Amount	Qualified Expected Ask Amount	Accepted Amount	P
OR-PSH 202...	Next step in past		3/31/2021	Major Giving	Cultivation	\$0.00	\$5,000.00	\$0.00	cc
OR-PSH 202...	Next step in past		3/31/2021	Major Giving	Cultivation	\$0.00	\$2,500.00	\$0.00	cc
OR-PSH 202...	Next step in past		4/30/2021	Major Giving	Cultivation	\$0.00	\$5,000.00	\$0.00	cc
OR-PSH 202...	Upcoming step		5/31/2021	Major Giving	Cultivation	\$0.00	\$15,000.00	\$0.00	cc
OR-PSH 202...	Upcoming step	2/13/2020	5/28/2021	Major Giving	Cultivation	\$0.00	\$1,000.00	\$0.00	cc

DREAM Knowledgebase

- ? Entering Prospect Plans
- ? Entering Opportunities



# Solution: Donors tab with View Data Form

```
<RenderStyle>  
  <RepeaterView>  
    <DetailViewForm ViewDataFormID="" />  
  </RepeaterView>  
</RenderStyle>
```

Funds Interactions Communications Events Major Giving Grants **Donors** Revenue

**Donor Profile**

Donor: Trust

Sites: Selected sites

**Giving Summary**

Lifetime giving to Hospital Foundation Trust (con-12029069)

Lifetime Giving		Calendar Year Giving	
Cumulative Giving:	\$4,000,000.00	Current Year:	\$2,000,000.00
Number of Gifts:	3	Prior Year:	\$2,000,000.00
Average Gift:	\$1,333,333.33	Two Years Ago:	\$0.00
Distinct Transaction Years:	2	Three Years Ago:	\$0.00
Consec. Transaction Years:	2 from today / 2 longest trend	Four Years Ago:	\$0.00
Open Balance on Pledges:	\$2,000,000.00	Five Years Ago:	\$0.00

Top Areas of Support		Largest Gift	
Top Designation(s):	\$2,000,000.00 (50%) to CA-MIS Center for Care	Largest Gift:	12/29/2020
	\$2,000,000.00 (50%) to CA-MIS Care Endowment Fund	Largest Gift Amount:	\$4,000,000.00
		Designation(s):	\$2,000,000.00 (50%) to CA-MIS Center for Care
			\$2,000,000.00 (50%) to CA-MIS Care Endowment Fund

First Gift		Most Recent Gift	
First Gift:	12/29/2020	Most Recent Gift:	1/19/2021
First Gift Amount:	\$2,000,000.00	Most Recent Gift Amount:	\$2,000,000.00
Designation(s):	CA-MIS Center for Care	Designation(s):	CA-MIS Care Endowment Fund

Other Foundations Supported

No Other Foundations Supported

Giving summary as of: 4/8/2021 12:44:47 PM +00:00



## Learned During Process

- List builders tend to run slower than data lists.
- List builders appear to run SQL twice.
- Top level filter will clear non-dependent parameters in dependent sections.
- Ideally the final design will move away from a hub and largely transfer what are tabs in the Hub to replace the existing CRM functional areas.



# Reception

- Feedback has been extremely positive.
- Admins and managers appreciate the context-less view.
- Users appreciate embedded actions.
- New field requests common.
- New tab requests on occasion.



## Next: Functional Area Clean-up

- Simplify navigation by removing/tidying functional areas.
- Redesign to follow a similar layout to the Foundation Hub.
- Start with Administration.
  - Least impact to users.
  - Least resistance from users.
  - Prep and tidy other areas by moving configuration and reference data tasks to Administration.

# Layout: Administration Functional Area

Home | PSJH Foundation Hub | Constituents | Marketing Administration | Communications Center | Revenue | Events | Memberships | Prospects | Volunteers | Fundraising

## Administration

Global filter

Sites: Selected sites | Dates Between: mm/dd/yyyy and: mm/dd/yyyy

Data | Quality | System | Security | Reference and Master Data | **Configuration**

### Tools

- Import configuration
- Export configuration

### Communications

- Address processing options
- Ask ladders
- Communication name patterns
- Communication templates
- Finder number settings
- Letter template library
- Name format options
- Planned gift receipts
- Receipt and acknowledgement preferences
- Source codes

### Constituent

- Bio updates
- Caregiver
- Household
- Life changes
- Patient data import
- Relationships

### Event

- Event management templates

### Global

- Attribute categories
- Audit tables

### Prospect

- Capacity formulas
- Confidence settings

### Revenue

- Blackbaud Payment Service merchant accounts
- Default gift fees

# Layout: Quality

**Administration**

**Global filter**

Sites: Selected sites | Dates Between: mm/dd/yyyy and: mm/dd/yyyy

Data | **Quality** | System | Security | Reference and Master Data | Configuration

Summary | Revenue | Constituent | Plan | Ignored

**Flagged Audit Records by Record Type (3)**

Record Type	Total	Percent of Total (%)
Constituent	14,491	89.37
Revenue	1,721	10.61
Plan	1	0.00

**Flagged Audit Records by Site (5)**

Site Name	Total	Percent of Total (%)
	15,742	97.09
	195	1.20
	112	0.69
	101	0.62
	63	0.38

**Flagged Audit Records by Condition (19)**

Record Type	Audit Flag Condition	Total	Percent of Total (%)
Constituent	Constituent has no name formats	13,123	80.94
Revenue	Revenue has one or more applications that have more than one spouse recognition credit	920	5.67
Constituent	Deceased spouse displays within joint salutation	648	3.99
Revenue	Revenue from managed prospect and no revenue solicitor added (revenue in 2020 and I...	468	2.88
Constituent	Constituent has spouse that is an inactive record	431	2.65
Revenue	Matching gift not associated to Third Party recognition credit type	222	1.36
Constituent	Constituent has more than one spouse	103	0.63
Constituent	Constituent has more than one recognition default that gives spouse credit	95	0.58
Revenue	Payments incorrectly applied to installments	57	0.35
Constituent	Constituent has no site and caregiver that created has a site	48	0.29
Revenue	Revenue has one or more applications where a donor is credited more than once	34	0.20
Revenue	No valid address for not received payment	18	0.11
Constituent	Name includes 'estate' and does not have Estate constituency	16	0.09
Constituent	Household has 2 members - one active and not deceased and the other inactive not de...	14	0.08
Constituent	Household has less than 2 members	7	0.04
Constituent	Name includes 'matching' and does not have Matching gift organization constituency	5	0.03
Revenue	One or more recognition credits is greater than its associated revenue split amount	2	0.01
Constituent	Prospect and management team do not all share at least one site	1	0.00
Prospect Plan	Another active plan is on prospect without a matching plan site	1	0.00

# Layout: Data Quality Audits - Details

The screenshot displays a software interface for data quality audits. At the top, there is a navigation menu with tabs for Data, Quality, System, Security, Reference and Master Data, and Configuration. Below this is a sub-menu with tabs for Summary, Revenue, Constituent, Plan, and Ignored. The main content area is titled "Revenue Audit (57)" and includes a search bar and several action buttons: Columns, Save list, Open list, and Clear all filters. A table of audit results is shown, with columns for Condition, Transaction Type, Revenue Date, Revenue Amount, Donor, Site Acronym, Date Changed, and Changed by Use... The first row of the table is highlighted and contains the following data: Condition: Payments incorrectly applied to installments, Transaction Type: Pledge, Revenue Date: 3/17/2008, Revenue Amount: \$500.00, Donor: [redacted], Site Acronym: AK-ANC, Date Changed: 6/6/2020. Below the table, a red box highlights the details for this specific audit entry. The details are organized into sections: Pledge Details, Appeal Details, Designations, and Processing and Post. The Pledge Details section includes Subtype: Standard, Paid: \$500.00, Balance: \$0.00, and Write Offs: \$0.00. The Appeal Details section includes Appeal: AK-AK 2008 Employee Helping Hands and Channel: None identified. The Designations section includes AK-ANC I [redacted]. The Processing and Post section includes Batch Number: AK-AK 08-4223 and Post Status: Do not post. At the bottom of the details box, the site information is displayed: Site: Providence Alaska Foundation, Anchorage, rev-15156728.

Condition	Transaction Type	Revenue Date	Revenue Amount	Donor	Site Acronym	Date Changed	Changed by Use...
Payments incorrectly applied to installments	Pledge	3/17/2008	\$500.00	[redacted]	AK-ANC	6/6/2020	[redacted]

**3/17/2008 Pledge of \$500.00**  
\*given anonymously

**Pledge Details**

Subtype:	Standard
Paid:	\$500.00
Balance:	\$0.00
Write Offs:	\$0.00

**Appeal Details**

Appeal:	AK-AK 2008 Employee Helping Hands
Channel:	None identified

**Designations:**

AK-ANC I [redacted]

**Processing and Post**

Batch Number:	AK-AK 08-4223
Post Status:	Do not post

Site: Providence Alaska Foundation, Anchorage  
rev-15156728



## Reception & Learned

- Users have adopted Administration without reports of confusion.
- Layout has made finding locations for update easier for admin team.
- New quality feature has varying degree of adoption throughout Foundations.
  
- As new features are added to DREAM, continued upkeep to ensure configuration and reference data links are added to Administration and not other functional areas.
- Already some new features that were introduced to DREAM without this consideration, leading to discrepancy in approach.





Stay Connected



David Stepp

[david.stepp@providence.org](mailto:david.stepp@providence.org)

Dan Napolitano

[daniel.napolitano@providence.org](mailto:daniel.napolitano@providence.org)

Cary Mayeda

[cary.mayeda@providence.org](mailto:cary.mayeda@providence.org)



#bbdevdays

Thank you!