

Platform Notifications

Notifications provide you with actionable information in the Platform and through Digest emails to boost the way you work. Examples of notifications include birthday reminders, recent donations, giving milestones, and even administrative notices. By default, you'll be signed up for notifications that are relevant to your role. You can change your notification settings and sign up for new notifications any time through the Notification Settings area (see Managing your Notification Settings below).

Notifications in the Drawer

In the Platform, you can view your notifications at any time in the Drawer. Click the notification (bell) icon on the right side of your screen to access the Notifications section of the Drawer. Your notifications will be grouped into sections to help categorize related notifications, and so that your most important notifications rise to the top. Within each section, the most recent notifications will appear at the top. If you have multiple notifications of the same type, they will be grouped into a category. Simply click on the category to view each individual notification. You can take action on any notification by clicking to drill in. For example, clicking on a Birthday notification will open up the entity's Relationship Profile.

When you have new notifications, a red badge will appear over the notification icon in the drawer. The number on the badge indicates the number of new notifications. Each new notification will be indicated in the list with a blue dot on the left side. Notifications will automatically clear from the Drawer generally within 7 days. You can also remove notifications immediately by clicking the X icon to the right of the notification.

Digest Emails

For most notifications, you can choose to receive emails either Daily or Weekly. Your email notifications are rolled up into a daily and weekly digest, providing a concise summary of notifications for the day and week. For example, suppose you are signed up to receive both the "Assigned Prospect Birthday Reminder" notification and the "Assigned Prospect Giving" notification daily. You would see both of these notifications summarized in a single Daily Digest email.

Daily digests typically show activity for the previous, current, and next day, where applicable. For example, the Daily Digest would show all assigned prospect birthdays for today and tomorrow, and would show all assigned prospect giving from yesterday. Similarly, the Weekly Digest shows activity for the previous, current, and following week, where applicable.

There are a few emails that will remain separate from the daily and weekly digests. These include "Email Only" notifications which contain a lot of content, such as the Volunteer Network Fundraising Summary and Activity Center Summary. There are also some email notifications which are sent immediately, rather than appearing in the digest, such as notifications for assigned tasks.

Managing your Notification Settings

You can manage your notification settings by navigating to the Notifications section of the Drawer, and clicking the gear icon in the upper right corner of the Drawer. This will show a list of all of the notifications that are available to you. The icons to the right of each notification indicate which notifications you are currently receiving. The bell icon indicates that you are signed up to receive the notification in the Drawer, and the email icon indicates that you are signed up to receive the notification through email. Clicking on one of the notifications in the list will expand that notification and allow you to modify your settings for that notification.

Adding and Removing other Subscribers

You can also subscribe or unsubscribe other users from Notifications. If there are certain notifications you think other people on your team can benefit from, it's easy to sign them up for those notifications. First, access your notification settings by navigating to the Notifications section of the Drawer, and clicking the gear icon in the upper right corner of the Drawer. Then, click the Add/Remove Subscribers tab within the settings modal. From there, you can see every user that is signed up for each notification. You can add subscribers by clicking the Add Subscribers button at the top of the modal, and you can remove subscribers by clicking the X button next to their name. Users will be notified through email that their notification settings have been changed.

Notifications by Type

Action Required

- The **Assigned Tasks** notification alerts you when another user assigns you a task. You can click on the notification to open up the task

record and accept or reject the task. Since this notification requires you to take action, it cannot be dismissed. This notification is only available to users with an Activity Center seat.

- The **Incomplete Contact Reports** notification alerts you when you start a contact report by emailing it to contactreport@performancemanagement.blackbaud.com. You can click on the notification to complete or delete the contact report. Since this notification requires you to take action, it cannot be dismissed. This notification is only available to users with an Activity Center seat.

System Administration

- The **Code Mapping Reminder** notification is available for System Administrators to notify them when they have codes that are not mapped. This is helpful as new codes are added and need to be configured for the platform. For example, if a new contact type of "On-Campus Visit" is added, the administrator would be notified that the code has not mapped and could then go into the platform and map the code to "Visit", which would allow those contacts to be credited as visits in the reports. You can choose to be reminded on a daily, weekly, or monthly basis. You will only be sent an email if there are unmapped codes. This notification is only available to users with access to the Manage Platform tab in Control Panel.
- The **Officer Peer Group Reminder** notification is available for System Administrators to notify them when they have gift officers that are not assigned to a peer group. This is helpful as new gift officers are added. The administrator will be notified that the new gift officer has not been assigned to a peer group, and can then go into control panel and choose the correct peer group for that officer. You can choose to be reminded on a daily, weekly, or monthly basis. You will only be sent an email if there are officers that are not assigned to a peer group. This notification is only available to users with access to the Manage Users tab in Control Panel.

Touch Points

- The **Assigned Prospect Birthday Reminder** notification alerts you when you have a prospect assignment with an upcoming birthday. You can choose to be notified about only your primary assignments, only your non-primary assignments, or about all assignments. In order for this Notification to work properly, your user account must be associated with a Gift Officer ID within Blackbaud Fundraiser Performance Management.
- The **Assigned Prospect Giving** notification alerts you when a recent donation has been received from one of your prospect assignments. You can choose to be notified about only your primary assignments, only your non-primary assignments, or about all assignments. In order for this Notification to work properly, your user account must be associated with a Gift Officer ID within Blackbaud Fundraiser Performance Management.
- The **Assigned Prospect Giving Milestones** notification alerts you when your assigned prospects reach one of the following lifetime cash giving milestones: \$1,000, \$5,000, \$10,000, \$25,000, \$50,000, \$100,000, \$250,000, \$500,000, and \$1,000,000. You can choose to be notified about only your primary assignments, only your non-primary assignments, or about all assignments. In order for this Notification to work properly, your user account must be associated with a Gift Officer ID within Blackbaud Fundraiser Performance Management.
- The **Assigned Prospect Giving Anniversary** notification alerts you when your assigned prospects have upcoming or recent donation anniversaries. You can choose to be notified about only your primary assignments, only your non-primary assignments, or about all assignments. In order for this Notification to work properly, your user account must be associated with a Gift Officer ID within Blackbaud Fundraiser Performance Management.

General/Interest

- The **Prospect Contact Reminder** notification alerts you when your assigned prospects have not been contacted in more than 90 days. You can choose to be notified about only your primary assignments, only your non-primary assignments, or about all assignments. In order for this Notification to work properly, your user account must be associated with a Gift Officer ID within Blackbaud Fundraiser Performance Management.
- The **Lifetime Cash Giving Milestones** notification alerts you when donors cross key lifetime giving milestones. The milestones include \$1,000, \$5,000, \$10,000, \$25,000, \$50,000, \$100,000, \$250,000, \$500,000, and \$1,000,000. This notification includes all donors for your institution and is not based only on your assigned prospects.
- The **Yearly Cash Giving Milestones** notification alerts you when donors cross key giving milestones during the calendar year or fiscal year, depending on which option you choose. The milestone include \$1,000, \$5,000, \$10,000, \$25,000, \$50,000, \$100,000, \$250,000, \$500,000, and \$1,000,000. This notification includes all donors for your institution and is not based only on your assigned prospects.
- The **Activity Center Contact Updates** notification alerts you when another user creates or edits a contact report on your behalf. This notification is only available to users with an Activity Center seat.

Email Only

- The **Activity Center Summary** notification provides an email summary of upcoming activities, as well as activities that are overdue. This notification is only available to users with an Activity Center seat.
- The **Proposal Reminder** notification alerts you when your assigned prospects with proposals that are coming up or overdue in terms of the target ask date or expected close date. You can choose to be notified about only your primary assignments, only your non-primary assignments, or about all assignments. In order for this Notification to work properly, your user account must be associated with a Gift Officer ID within Blackbaud Fundraiser Performance Management.

- The **Volunteer Network Fundraising Activity** notification provides an email summary of activity from Volunteer Network Fundraising, including new assignments, new contacts and pledge card requests. This notification is only available to users with access to Volunteer Network Fundraising.
- The **Officer Goals Monthly Status** notification provides an email summary of all active goals assigned to you. It is sent on the first Monday of each month. This notification is only applicable to officer users of the platform.