

August 2022

The release notes reflected below are from the most recent releases of Fundraiser Performance Management. This list consists of key new features, as well as issues reported by or of interest to customers. It is not an exhaustive list of updates.

Please note since the [last release](#), the majority of the work has been focused on high urgency bug fixes and behind-the-scenes improvements.

Upcoming Change

We are pleased to announce that FPM has begun the process of upgrading to the SKY UX user interface. For more details, check out the announcement [here](#).

New Features

- On the Console, when you **Set Officer Goals** and edit the goals, under any proposal related goal we added **Proposal Assignment Type**. We also added **Proposal Assignment Type** for Peer Group goals. Shout out to Auburn University Foundation and Utah State University for helping champion this feature!

Edit Goals - Daniel McCune

Select a Goal Metric

☒ Amount Granted

☐ Amount Submitted

☐ Contacts

☒ First Time Visits

☒ Proposals Granted

☐ Proposals Submitted

☒ Visits

5 Goals

Proposals Granted

×

10

Greater Than Or E

▼

\$

25000

Proposal Type

Click here to add Type

Proposal Assignment Type

Primary (P) ▼

×

10

Greater Than

▼

\$

0

Proposal Type

Click here to add Type

Proposal Assignment Type

Non-Primary (NP) ▼

+ Add Proposals Granted Goal

- To better understand next steps for a prospect, we added a new filter, **Contact Report Outcomes**, to Targeter under Prospect Management. In addition, you can now add **Contact Report Outcomes** as a column in the Targeter query results.

Contact Report Outcomes

All

Ready for Cultivation

Ready for Solicitation

Disqualification

Move to Another Officer

Get Results

Add Columns

All Column Types:

Checked items will appear in the list to right

Entity

Contact Information

School of Graduation

Prospect Management

☐ Active Prospect Record(s)

☐ Annual Giving Ask Amount

☐ Assigned Gift Officers

☐ Assigned Volunteers

☐ Assigned Volunteers (VNF)

☐ Assignment Type

☐ Contact Report Outcomes

☐ Days Since Last Contact by Anyone

☐ Days Since Last Prospect Stage Change

☐ Days Since Last Visit by Anyone

☐ Last Activity Purpose

Selected Columns:

Drag items in this list up or down to change display order

Entity ID

First Name

Last Name

Primary Relationship Type

Net Worth

* All column selections will be saved automatically.

☐ Set as default display options for all new queries?

Cancel

Submit

- We added a new filter, **Previous Donor Status**, to Targeter under Donor Attributes. You can select different donor types from the previous two fiscal years (FY2021 and FY2022). Additional years will be added as fiscal years come to a close. Shout out to DePauw University for helping champion this feature!

Previous Donor Status

Specify Fiscal Year

2022

▼

Select Donor Type

Acquired

Retained

Renewed

Bug fixes and maintenance

In addition to general maintenance and specific customer bugs, security work was also addressed.

- We resolved an issue where users with edit tasks permission were unable to edit the tasks created by other users.
- In Major Giving, Officer Performance, we resolved an issue with the **Portfolio Donor Status vs. Peer Group** viewport when it's in bar chart view.
- In Major Giving, Office Performance, we resolved an issue with the **Prospect Stage Distribution vs. Peer Group** viewport where the prospect stage and assigned officer were incorrect.
- We resolved an issue where data from deleted campaigns were still showing in export files.
- We resolved an issue where Zillow links for an address with a ZIP + 4 were not taking the user to the specific address and instead were going to a view of the city map.
- We resolved an issue in Targeter where lists with custom columns were not updating after adding additional columns and selecting Submit. Now, users don't have to refresh or exit and return for the added columns to appear.
- We resolved an issue where Fundraising Performance Management did not appear in the solution menu from the top navigation bar.
- We resolved an issue with the relationship profile where entities with only an international address were displaying an error on page load.

Looking for updates on Volunteer Network Fundraising? See our [Volunteer Network Fundraising notes](#).

Need help?

Still having issues or need to report something new? Contact support: <https://support.blackbaud.com/>. Join in the conversation on [Blackbaud Community](#).