

## CRM 4.0 Service Pack 17 Release Notes – DRAFT (08/09/18)

This service pack is cumulative. It includes all issues addressed in CRM 4.0 prior to Service Pack 17, as well as any new features and changes outlined below. When you integrate CRM and Blackbaud Internet Solutions, we recommend you make sure both applications are running the same version and service pack.

Comment	Work Item	Knowledgebase
<p>New Feature: We have added a new additional consent type called "Advanced consent." This consent type is designed to give you the same specialized options that were previously only available for "EU Consent" types. We introduced the "EU Consent" solicit code type to accommodate compliance with General Data Protection Regulation (GDPR) requirements. However, you can take advantage of the detailed information in this type of solicit code by using the "Advanced consent" type, even if you are not in the European Union. Advanced consent solicit codes work identically to EU consent solicit codes and are available in all the same product areas: Constituent Solicit Code view, Query, Blackbaud Data Warehouse, Marketing and Communications, Batch (including Enhanced Revenue Batch), Channel Opt-out, Constituent Merge, and Global Change.</p>	947830	
<p>New Feature: We have added site security to Key Performance Indicators (KPIs) in the Blackbaud Data Warehouse. When you add a KPI, you now see the new "Sites" tab. When you select the "Site filter enabled" checkbox, the KPI can be secured by site by adding the relevant sites on that tab.</p>	998622	
<p>Technical Change: In our continued effort to improve security, we have restricted the use of certain custom page expressions. If you have a custom expression on any of your pages and you are using one of the expressions that are no longer supported, your page might not load and you may receive the following error: "The PageDefinitionSpec contains one or more unsupported expressions." If you encounter this error, please contact Blackbaud Customer Support so we can review your custom expression and determine whether it can be added to the list of supported expressions or whether the customization needs to be updated.</p>	930196	

<p>This fix addresses an issue that could create a failure in the ETL process. Previously, the ETL process could fail when it identified multiple primary address, email, or phone records for a constituent. This happened because of an issue with the time window used by the Blackbaud Data Warehouse ETL to determine which Enterprise CRM records to include in an incremental refresh. This fix prevents data discrepancies in the Blackbaud Data Warehouse if the database snapshot generated from Blackbaud CRM at the start of the ETL process is not instantaneous.</p>	979370	
<p>This fix addresses an issue that could occur when filtering through blacklisted email addresses. Previously, when you accessed email services under Administration, you received an error if you tried to filter for blacklisted email addresses that were older than 30 days.</p>	690607	<a href="#">106023</a>
<p>This fix addresses an issue that could sometimes happen when merging constituent records. Previously, you could receive an error when you attempted to merge constituents who both had major giving constituencies.</p>	929552	<a href="#">116540</a>
<p>This fix addresses an issue that could sometimes happen with pledge installment amounts. Previously, when you added a pledge with inconsistent payment amounts, the payment that was a different amount could appear to one of the middle payments rather than the last payment. With this fix, the odd amount is always the last payment.</p>	877425	<a href="#">114122</a>
<p>This fix addresses an issue that could sometimes occur when creating a Page ad-hoc query. Previously, when you created this type of query, you could see an error in the Preview pane. This happened when you did not enter criteria in the 'Include records where' section and when all the Page fields were added to 'Result fields to display.'</p>	694874	<a href="#">106702</a>
<p>This fix addresses an issue that could sometimes occur with recurring gift commitments. Previously, some recurring gift commitments would show inaccurate duplicate installments due. When this happened, a donor could appear as delinquent on their payment even when they were not.</p>	797450	<a href="#">113000</a>
<p>This fix addresses an issue that sometimes could happen when trying to merge two constituent records. Previously, you could sometimes receive an error when you attempted the merge. This happened when the target constituent was a Fundraiser or Prospect Manager and the other had the same name, title, and address.</p>	861381	<a href="#">81739</a>
<p>This fix addresses an issue with blacklisted email addresses. Previously, the system could not handle blacklisted email addresses in bulk.</p>	535793	<a href="#">95254</a>

<p>This fix addresses an issue with credit card expiration dates on the Blackbaud CRM credit card tokenizer. Previously, the tokenizer process could record the wrong expiration dates, and applied the current year as the expiration year. This happened because the tokenizer converted expiration dates in the MM/YY format into the MM/DD/YYYY format, even though expiration dates do not normally include a day. When this happened, the tokenizer added the current year as the expiration year, which could cause valid credit cards to show as expired. For example, an expiration date of 09/19 would be wrongly converted to 09/19/2018. Now, the date is correctly recorded as 09/2019.</p>	986448	
<p>This fix addresses an issue with Enhanced Revenue Batch. Previously, when you attempted to sell stock through this type of batch, you received an error.</p>	785106	
<p>This fix addresses an issue with marketing efforts. Previously, the source code settings were sometimes not carrying over to the effort settings on the marketing effort. This happened when you created a marketing effort based on the settings in a planned appeal and you used the 'Create effort from plan' on the Planned Efforts tab.</p>	785379	<a href="#">112259</a>
<p>This fix addresses an issue with pledge installment balances when using the Blackbaud Data Warehouse and multicurrency. Previously, pledge installment balances could be incorrect in some cases. This happened if you were using the Blackbaud Data Warehouse and the transaction currency was different from the base or organization currency. With this fix, the balances are not correct for multicurrency scenarios as long as the base currency of the account system is the same as your organization's currency.</p>	732383	<a href="#">109393</a>
<p>This fix addresses an issue with security in constituent recognition processes. Previously, users could have access to launch recognition processes even if their site security settings did not allow this access.</p>	926492	<a href="#">116368</a>
<p>This fix addresses an issue with the 'Manage purpose or designation attributes' global change. Previously, when you selected to 'Delete value if it exists' under 'Start date,' the global change made the 'New value' field required, even though you had intended to delete it.</p>	740309	
<p>This fix addresses an issue with the links on the Group Members tile on a constituent record. Previously, when you had both former and current members on a group, the filters to only see current or only see former members did not work.</p>	907054	<a href="#">115636</a>
<p>This fix addresses an issue with the links under the Models Score tab in constituent records under Wealth and Ratings. Previously, this link sometimes returned an error that the file was not found.</p>	924826	

This fix addresses an issue with the Revenue Annual Statement Report. Previously, users could see this report even when their site security settings did not grant them permission to see it. With this fix, only users with site security settings allowing access to the report can see it.	929154	<a href="#">116463</a>
This fix addresses an unexpected error that could sometimes occur when using the tokenizer process.	926572	<a href="#">116369</a>
We have optimized the Adjusted Revenue Report to improve performance.	977360	