

The Raiser's Edge™

Batch Guide

020612

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What Is In This Guide?

In the *Batch Guide*, you learn to work with constituent, gift, and time sheet batches. You can use the different types of batches to quickly enter and update information in your database and run reports based on that information. You can also learn about the following:

- “The Life of a Batch” on page 16
- “Validating a Batch” on page 60
- “Understanding the Multi-User Capabilities of a Gift Batch” on page 92
- “Committing a Batch” on page 203
- “Batch Reports” on page 291

How Do I Use These Guides?

The Raiser’s Edge user guides contain examples, scenarios, procedures, graphics, and conceptual information. Side margins contain notes, tips, warnings, and space for you to write your own notes.

To find help quickly and easily, you can access the **Raiser’s Edge** documentation from several places.

User Guides. To access PDF versions of the guides, select **Help, User Guides** from the shell menu bar, or click **Help** on the Raiser’s Edge bar in the program. You can also access the guides on our Web site at www.blackbaud.com. From the menu bar, select **Support, User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, you can access the help file to learn about **The Raiser’s Edge**. To access the help file, select **Help, The Raiser’s Edge Help Topics** from the shell menu bar, or press **F1** on your keyboard from anywhere in the program.

To narrow your search in the help file, enclose your search in quotation marks on the Search tab. For example, enter “Load Defaults” instead of Load Defaults. The help file searches for the complete phrase in quotes instead of individual words.

Constituent Batch

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To add a constituent to the database, you can use the Records page to create a constituent record that contains the appropriate information. When you add many constituent records to the database at once, this process may take a long time, depending on the number of constituents to add. *Batch* is an alternate method to add constituents, gifts, and time sheets to your database. With *Batch*, you can enter and update information on constituent and gift records quickly because you do not need to open each individual constituent or gift record to add or update information. Instead, you select the fields you want to add or update and the program lists these fields in a spreadsheet, called a batch, so you can efficiently enter information in the database.

There are three types of batches: constituent, gift, and time sheet.

- To add new constituent records to the database, use a constituent batch.
- To add new gifts, pledge payments, or recurring gifts to your database, use a gift batch.
- To add new time sheets to a constituent record, use a new time sheet batch.

To update or add information on the donor's constituent record, use the **Constituent Window** option in a gift or time sheet batch to access and modify information on a donor's constituent record.

Note: To move around *The Raiser's Edge* without the use of your mouse, you can use shortcut keys. Several examples of shortcut keys are listed throughout this guide. In addition, all shortcut keys available for *Records* fields are available for *Batch* fields. For example, on a constituent record, you can press **F3** on your keyboard to add a constituent's first name to the **Nickname** field. This same shortcut key exists for the **Nickname** field in a batch.

To create records for the gifts or constituents entered in a batch, you need to commit the batch to the database. When you commit a batch, the program checks for duplicate constituents, gifts, and time sheets. If the program finds a problem with an entry in the batch, it creates an exception and does not add the constituent, gift, or time sheet record to the database. If exceptions are created, you can edit the entry and recommit the information to the database.

Before you use *Batch* to add constituents, gifts, or time sheets to your database, please understand and practice how to enter constituents, gifts, and time sheets from the Records page of *The Raiser's Edge*. Many options available on constituent, gift, and time sheet records are available in *Batch* and work in a similar manner. This chapter focuses on constituent batches. For more details about gift batches, see "Gift Batch" on page 71.

Batch Setup Information

Before you begin to work with constituents in *Batch*, it is important that you understand some basic setup information that will help when you process constituents in a batch. This section outlines the information you need to be aware of before you process constituents in a batch. This section also offers a basic overview and directs you to more detailed sections and procedures in this chapter to help you get started. Setup information includes user options and business rules, as well as batch templates.

User Options

User options are preferences you set that affect how *The Raiser's Edge* looks and runs on the workstation you use. User options are login-specific, which means that if you log into any workstation with your password, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. Before you begin to work with constituents in a batch, it is important to set up user options. Several user options are specific to *Batch*. For example, you can automatically save an open batch at specified time intervals, select the format for constituent names in batch reports, and specify how to add default entries to a batch. For constituent batches, you can set user options to:

- Automatically save a batch when you close out of the batch.
- Automatically save a batch at regular intervals, such as every five minutes.
- Specify how you want constituent names to appear in a constituent batch.

- Automatically ask you to save the batch before you save information in a Constituent Window.
- Display the default row in the first row of the Data Entry grid.
- Specify whether to enter defaults in your batch when you press **F2** within a field, select a field, or begin a new row in the batch.
- Specify individual and organization report formats.
- Specify a color in the default row of a constituent batch row.

For detailed information about setting these user options, see “User Options” on page 9.

Business Rules

You set business rules to control certain functions and displays in *The Raiser’s Edge*. Unlike user options, business rules affect all users of the program. Several business rules affect the way you use *Batch*. For example, each constituent batch has a unique batch number associated with it. In business rules, you can select a meaningful format for the batch number. In addition, many business rules for constituent records also apply to constituents entered in *Batch*. For example, if you mark **Automatically update spouse having same last name** in the **Constituent options** folder of **Business Rules** and include the **Spouse** field in a batch, the last name of a constituent’s spouse updates when you change the last name of a constituent. For constituent batches, you can set business rules to specify batch numbers and select the format in which you want them to appear.

For detailed information about setting these business rules, see “Business Rules” on page 14.

Batch Templates

When you work with batches, you can easily create a new batch based on an existing batch to create a “template”. To create a batch template, you simply need to search for an existing batch in your database and copy the batch field list from that batch into your new batch. When you copy a field list to a new batch, you essentially use the existing batch as a template. In your new batch, you can add additional fields and remove unnecessary fields as needed.

To copy a field list from another batch, click **Load from Existing Batch** on the Fields tab of the Constituent Batch Setup screen. This feature saves you time because you do not need to re-create a field list you already used in another batch. When you load fields from another batch, the program replaces any fields in the **Data entry fields** box with the fields selected in the existing batch. When you click this button, the Open screen for batches appears so you can search for the existing batch from which you want to copy fields. After you select the **Data entry fields** for a batch and save the batch, you can copy the field list to use as a template when you create a new batch. For more information about creating batch templates, see “Creating a Batch Template by Loading Fields from an Existing Batch” on page 24.

Frequently Used Terms

This section defines words and phrases you need to know as you work with batch information. If you come across an unfamiliar term when you read this or any chapter of *The Raiser’s Edge* documentation, check the online glossary in the help file.

Batch. Batch is a method of data entry you can use to quickly create many new constituent, gift, or time sheet records. There are three types of batches — constituent, gift, and time sheet. A batch resembles a spreadsheet and each row of the spreadsheet contains information for a single gift, constituent, or time sheet record.

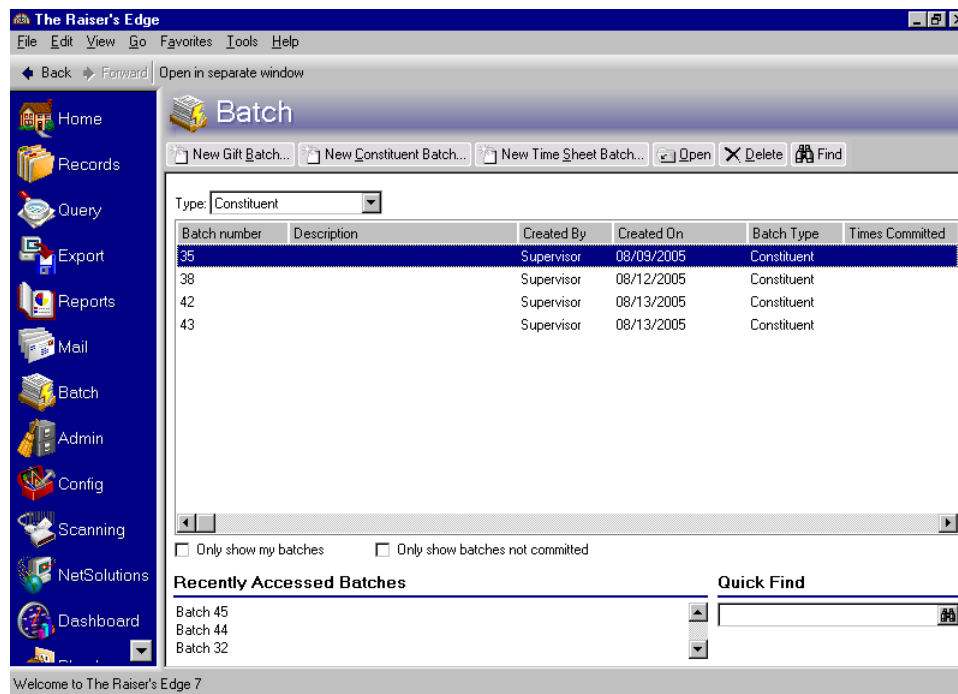
Data entry grid. When you set up a constituent batch, you define the columns that appear in the Data Entry screen from the Fields tab of the Constituent Batch Setup screen. The columns list in the order you select on the Fields tab.

Default row. When displayed, the Default Row is the first row in the Data Entry grid and contains the default values you selected on the Defaults tab of the Constituent Batch Setup screen. When you add constituents to the batch, any information you enter in the Default Row can appear as a default for each new constituent in the batch. In User Options, you can display or hide the Default Row, choose a color in which to display this row, and select how to add the defaults for each constituent.

Validate. When you validate a batch, the program checks the batch for duplicate constituents and other data entry errors that may cause exceptions when you commit a batch to the database. For example, you enter prospects in a constituent batch and add Mark Adamson in this batch. However, Mark Adamson already has a constituent record in your database. When you validate the constituent batch, the program alerts you that Mark Adamson already has a constituent record. If no changes are made to the batch and you commit the batch to the database, the exceptions will not commit to the database.

Navigating in Batch

You can create new constituent batches and access existing constituent batches from the Batch page. To access the Batch page, click **Batch** on the Raiser's Edge bar.



Tip: You can use shortcut keys to move around *The Raiser's Edge* without using your mouse. For example, press **CTRL + S** on your keyboard to save a batch or **CTRL + O** to open a batch.

The grid displays all the constituent, gift, and time sheet batches in your database. To create a new constituent batch, click **New Constituent Batch**. To narrow the batches that display in the grid, you can use the **Type** and **Display** fields. For example, to display only constituent batches in the grid, select Constituent in the **Type** field.

To specify that only the batches you create appear in the grid, mark **Only show my batches**. To specify that only non-committed batches appear in the grid, mark **Only show batches not committed**.

The Batch page also contains a list of recently accessed batches. To open any batch in this list, click the batch. To quickly find a batch, enter a batch number in the **Quick Find** field and click the binoculars to display the Data Entry screen for the batch that matches your entry.

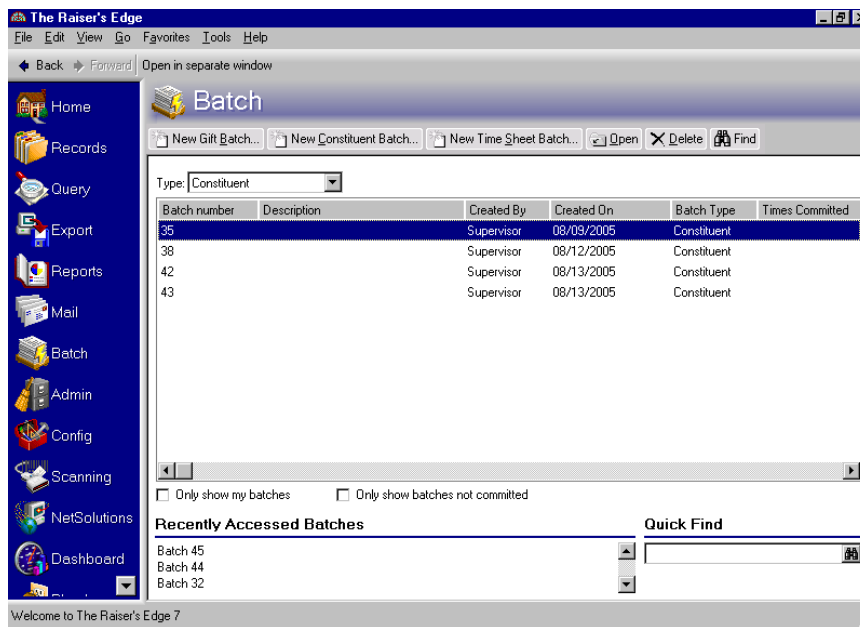
Accessing a Constituent Batch

Warning: If you do not have security rights to open a constituent batch, the **Other users may access this batch** checkbox is not marked, or if you did not originally create the batch, you receive the message “User not authorized to access this batch.”

From the Batch page, you can open any constituent, gift, or time sheet batch in your database. To open a batch, you must have appropriate security rights. For more information about security, see the *Configuration & Security Guide*. Also, if **Other users may access this batch** on the Constituent Batch Setup screen is not marked, you cannot open the batch unless you originally created it.

► Opening a constituent batch from the Batch page

1. On the Raiser's Edge bar, click **Batch**. The Batch page appears.



Tip: To narrow the number of batches that appear in the grid, select Constituent in the **Type** field. The **Display** field affects whether recurring or non-recurring gift batches display in the grid.

2. In the grid, highlight the constituent batch you want to open.

3. On the action bar at the top of the page, click **Open**. The Data Entry screen appears.

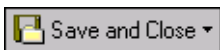
Key Indicator	Title 1	First Name	Middle Name	Last Name	Org Name	ID	Address Address...	Address City	Address State
Individual		Frank		Pierce		5692	402 Valley Brook ...	Athens	GA
Individual	Mr.	Alison		Roger		5693	506 North Murra...	Charleston	SC
Individual	Mrs.	Margo		LaRue		5694	11 Peachtree Court	Atlanta	GA
Individual	Mr.	Jason		Hills		5695	453 Chimney Lane	Montgomery	AL

4. Make any necessary changes to the batch and click **Save and Close** on the toolbar. You return to the Batch page.

Batch Toolbar

Note: You can set up a user option to view tooltips that explain the function of each toolbar command. Tooltips appear when you move your cursor across each item on the toolbar. For more information about setting up this user option, see the User Options chapter of the *Program Basics Guide*.

The toolbar contains buttons that represent common commands for a constituent batch. To save time during data entry, you can use these buttons as alternatives to menu commands.



Save and close the constituent batch (**Save and New** can be accessed from the down arrow beside **Save and Close**. Use **Save and New** to save the batch, close the saved batch, and open a new batch.)



Save the constituent batch



Commit the constituent batch to the database



Print a report – Click the down arrow and select a report to print.



Preview a report – Click the down arrow and select a report to preview.



Access the Constituent Batch Setup screen



Check for duplicate constituents in the batch



Validate the constituent batch



Access AddressAccelerator screen



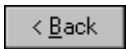
Add constituent batch to favorites



Access help from online help files, user guides, online support, or the Blackbaud Web site

Buttons

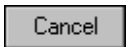
At the bottom of the Constituent Batch Setup screen, several buttons appear to help you navigate through the tabs and set up your batch.



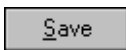
Go to the previous tab



Go to the next tab



Close the screen



Save the constituent batch setup



Open the Data Entry screen for a constituent batch

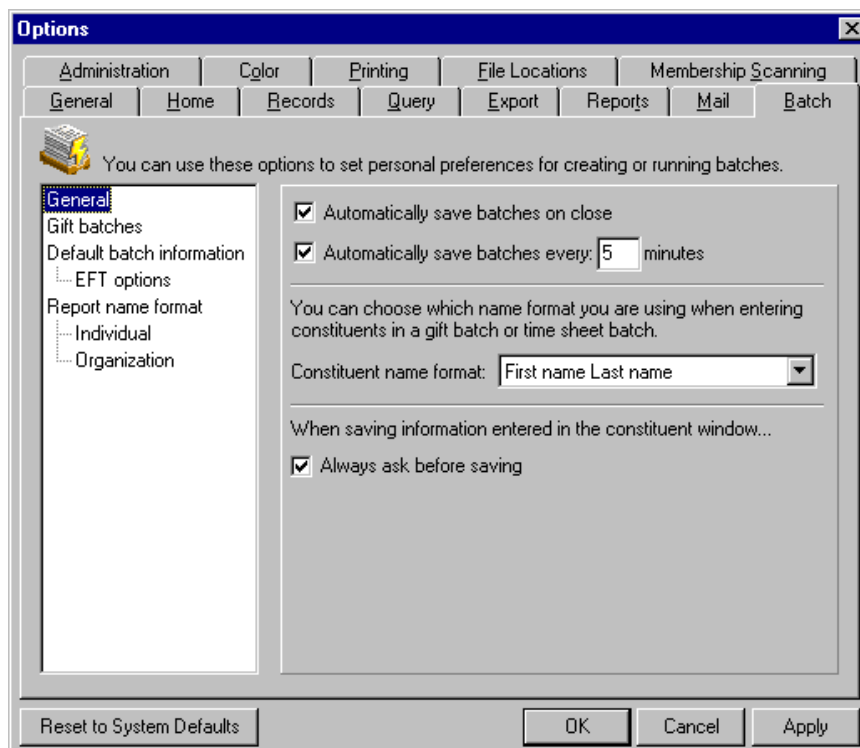
User Options

User options are preferences you set that affect how *The Raiser's Edge* looks and runs on the workstation you use. User options are login-specific. If you log into any workstation with your password, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. Several user options are specific to *Batch*. For example, you can automatically save an open batch at specified time intervals, select the format for constituent names in batch reports, and specify how you want to add default entries to a batch. For more information about User Options, see the *Program Basics Guide*.

► Defining user options

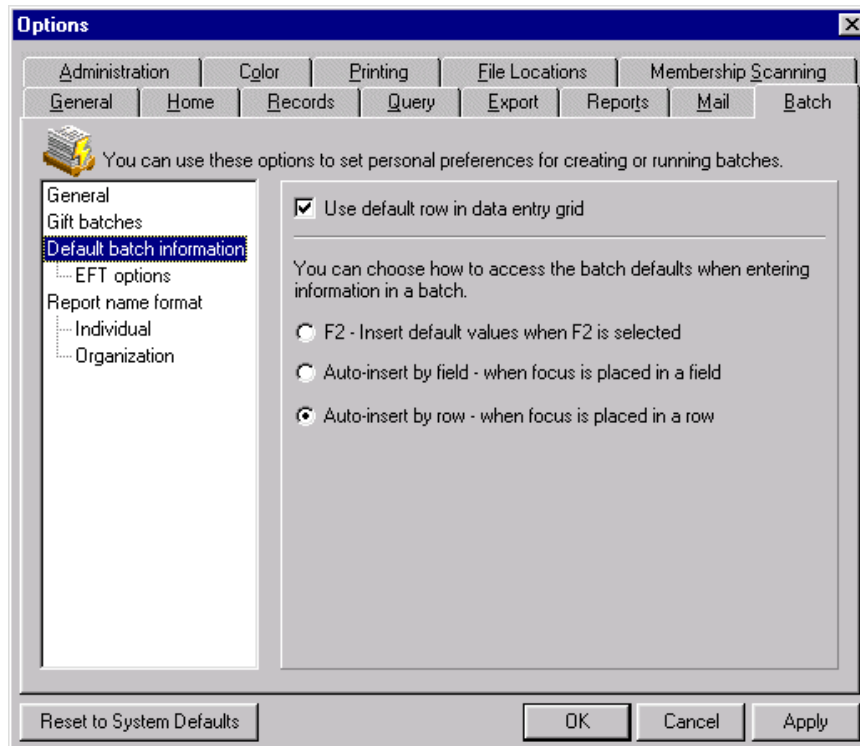
This procedure explains how to set up user options specific to *Batch*. For complete information about User Options, see the *Program Basics Guide*.

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools, User Options**. The Options screen appears.
2. Select the Batch tab.
3. From the tree view on the left side of the Options screen, select **General**. General batch options appear on the right side of the screen.



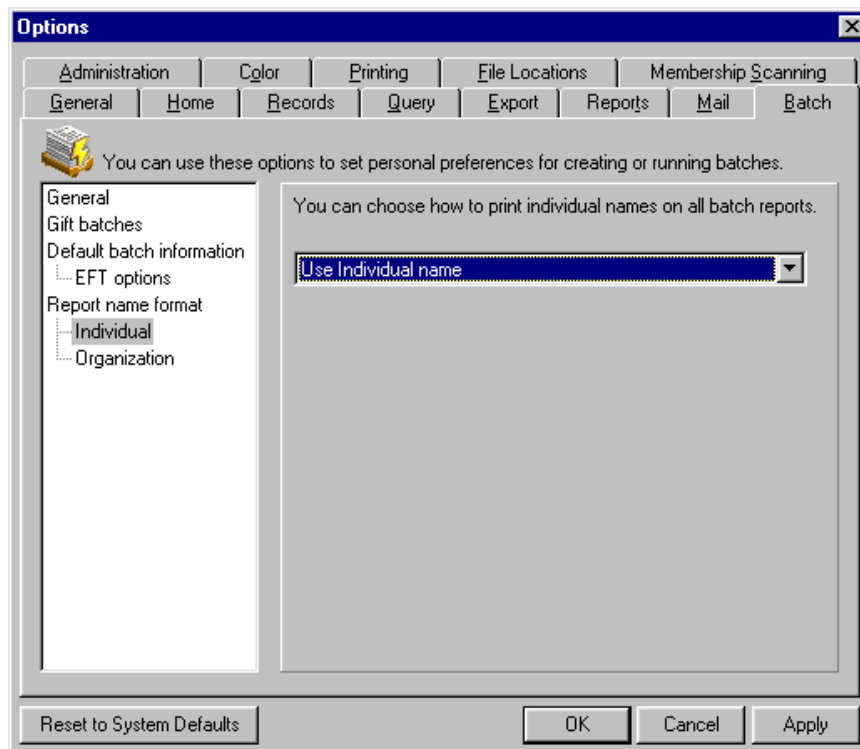
4. To automatically save the information entered in a batch when you close the Data Entry screen, mark **Automatically save batches on close**.
5. To automatically save the information entered in an open batch at regular intervals, mark **Automatically save batches every [] minutes**. When you mark this checkbox, enter the time interval used to automatically save the batch. For example, if you want to automatically save an open batch every five minutes, enter "5" in the field.
6. In the **Constituent name format** field, select the format for the constituent names you enter in a batch. For example, to have the first name appear before the last name for a constituent, select "First name Last name".

7. To have *The Raiser's Edge* display a message before it updates the database with information entered in the constituent window, in the **When saving information entered in the constituent window** frame, mark **Always ask before saving**.
8. From the tree view on the left side of the Options screen, select **Default batch information**. The default options appear on the right side of the screen.



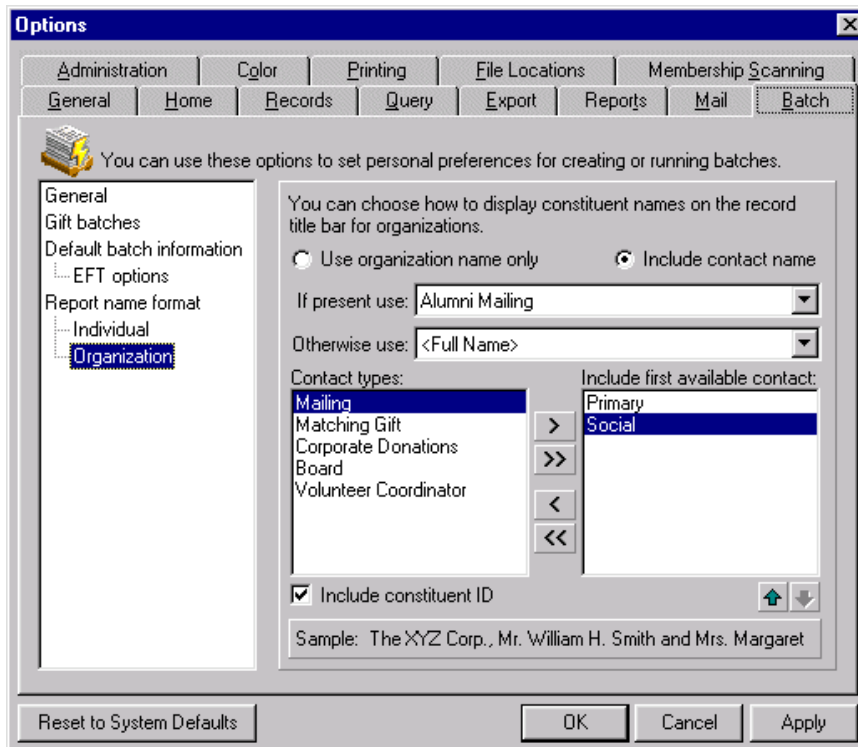
9. To display the default row in the first row of the Data Entry grid, mark **Use default row in data entry grid**.
10. Select whether to enter defaults in your batch when you press **F2** within a field, select a field, or begin a new row in the batch.
11. If you use the optional module *Electronic Funds Transfer*, you can select **EFT options** from the tree view on the left side of the Options screen. For more information about this user option, see the User Options section of the *Electronic Funds Transfer (EFT) Guide*.

12. From the tree view on the left side of the Options screen, select **Individual** under the **Report name format** heading. The individual name options appear on the right side of the screen.



13. In the **You can choose how to print individual names on all batch reports** field, select Use addressee from Individual, Use addressee from Configuration, or Use Individual name. If you select Use addressee from Individual or Use addressee from Configuration, additional fields appear on this screen so you can select the specific addressee to use.

14. From the tree view on the left side of the Options screen, select **Organization** under the **Report name format** heading. The individual name options appear on the right side of the screen.



15. In the **You can choose how to print organization names on all batch reports** field, select **Use organization name only** or **Include contact name**. If you select **Include contact name**, additional fields become enabled so you can select the specific contacts to include.
16. If you mark **Include contact name**, select a format for the contact name in the **If present use** field. If that format is not entered on the contact's constituent record, select an alternative in the **Otherwise use** field.
17. To select the contact types to include, highlight a contact type in the **Contact types** box and click the right arrow to move it to the **Include first available contact** box. If you include multiple contact types, use the up and down arrows to arrange them in order of importance.

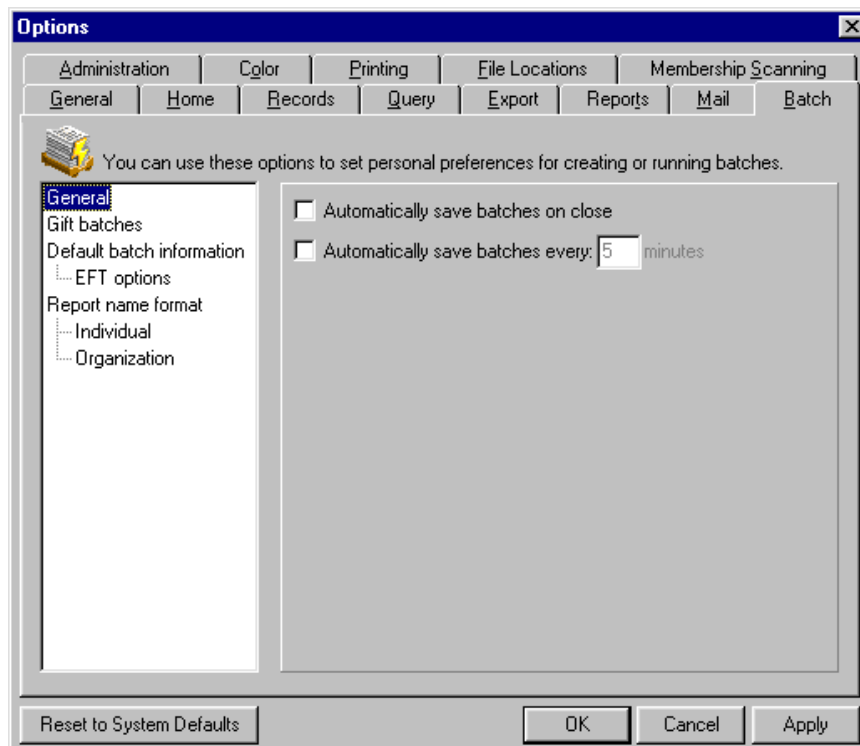
Note: To undo any changes you made and reestablish all program settings, click **Reset to System Defaults**.

18. To include the constituent ID at the end of the organization name, mark **Include constituent ID**.
19. To save your changes, click **OK**.

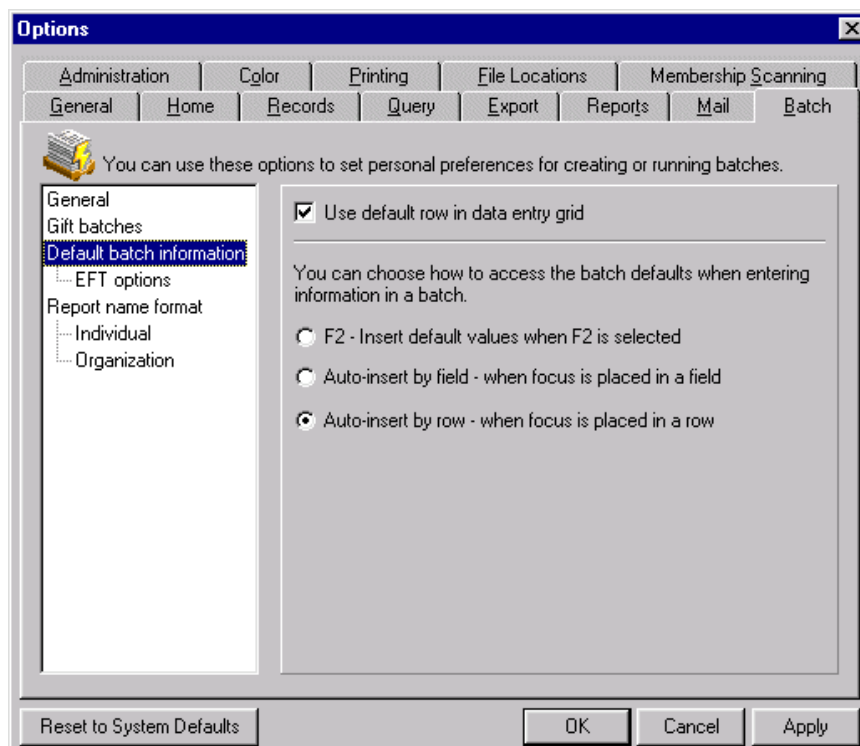
► Displaying the default row

- From the menu bar on the shell of *The Raiser's Edge*, select **Tools, User Options**. The Options screen appears.

2. Select the Batch tab.

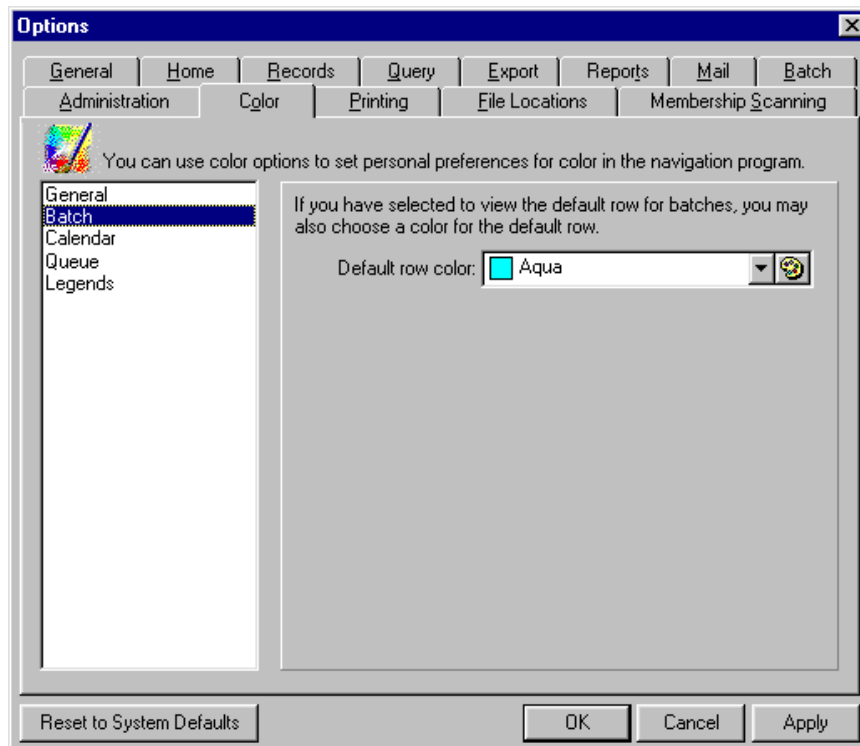


3. From the tree view on the left side of the Options screen, select **Default batch information**. The default options appear on the right side of the screen.



Note: If you hide the Default Row, it does not affect your ability to add defaults to a batch. The Default Row is a tool to see and easily change the current default settings for a batch.

4. To display the default row in the first row of the Data Entry grid, mark **Use default row in data entry grid**.
5. Select whether to enter defaults in your batch when you press **F2** within a field, select a field, or begin a new row in the batch.
6. Select the Color tab.
7. From the list on the left side of the Options screen, select **Batch**. The color options for the Default Row appear on the right side of the screen.



8. In the **Default row color** field, select the color in which you want to display the Default Row.
9. To save your changes, click **OK**.

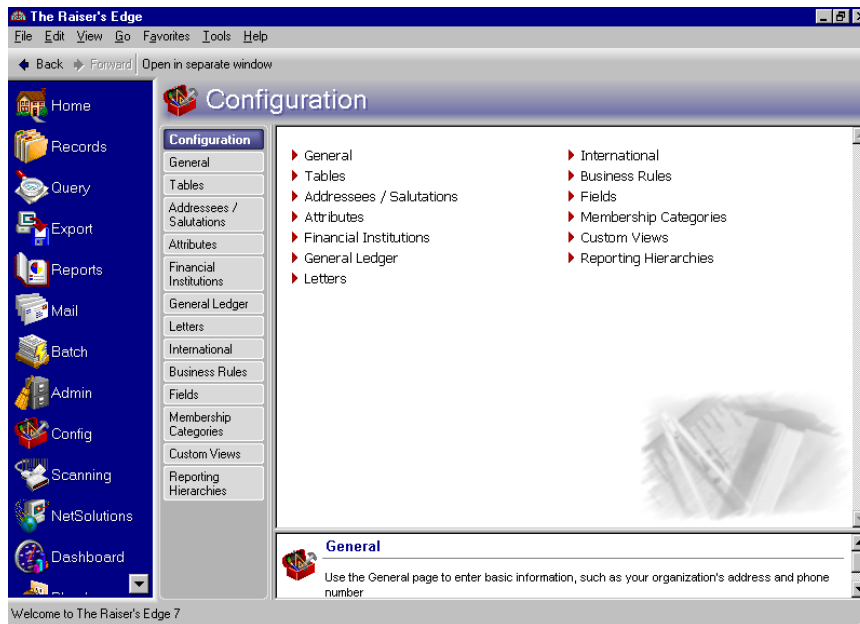
Business Rules

You can set business rules to control certain functions and displays in *The Raiser's Edge*. Unlike user options, business rules affect all users of the program. Several business rules affect the way you use *Batch*. For example, each constituent, gift, and time sheet batch has a unique batch number associated with it. In business rules, you can select a meaningful format for the batch number. In addition, many business rules for constituent records also apply to constituents entered in *Batch*. For example, if you mark **Automatically update spouse having same last name** in the **Constituent options** folder of **Business Rules** and include the **Spouse** field in a batch, the last name of a constituent's spouse is updated when you change the last name of a constituent. For complete information about business rules, see the *Configuration & Security Guide*.

► Defining the batch number format

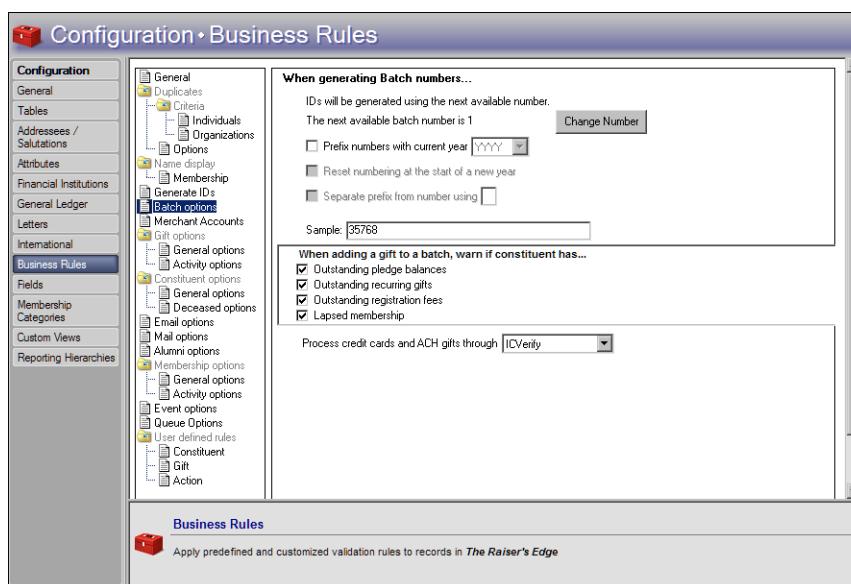
Before you begin to use *Batch*, decide how to format the batch numbers. Constituent, gift, and time sheet batches use the same format, and batch numbers are not duplicated between them. For example, if you create a constituent batch with a batch number of 2005-193, the program cannot create a gift batch with the same number.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.



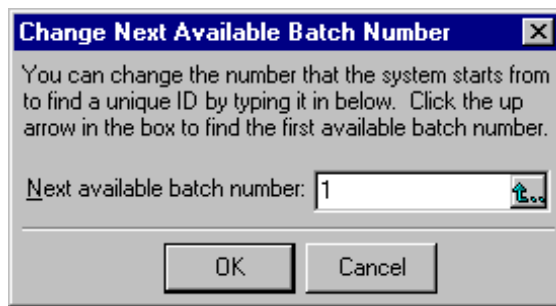
Warning: To access the **Business Rules** link in *Configuration*, you must have security rights.

2. Click **Business Rules**. The Business Rules page appears.
3. On the Business Rules page, select **Batch options** from the tree view. The Business Rules screen displays the batch-related options.



Note: When you create a new batch, the program updates the next available batch number listed in the **When generating Batch numbers** frame. The program uses this number as a reference point to begin searches for the next unused batch number.

4. To generate batch numbers, *The Raiser's Edge* searches for the lowest available number that occurs after the batch number listed in the **When generating Batch numbers** frame. You can click **Change Number** to find and change the reference number the program uses to find a unique batch number. When you click **Change Number**, the Change Next Available Batch Number screen appears.



5. In the **Next available batch number** field, enter the number you want *The Raiser's Edge* to use when it begins to search for the next unique batch number. If you click the search button in the **Next available batch number** field, the program searches for the next unique batch number available.
6. Click **OK**. You return to the Business Rules page.
7. To display the year the batch is created before the batch number, mark **Prefix numbers with current year**. When you mark this checkbox, select whether to display the year in two or four characters.

Note: Batch numbers must be unique. Before you can **Reset numbering at the start of a new year**, mark **Prefix numbers with current year**.

8. If you include the year before a batch number, **Reset numbering at the start of a new year** is enabled. If you mark this checkbox, the program resets the next available batch number to 1 at the beginning of the year.
9. If you include the year before a batch number, **Separate prefix from number using** is enabled. When you mark this checkbox, enter the symbol to separate the sections of a batch number. For example, if you enter a hyphen in this field, the program formats the batch number as 2005-35768.
10. The **Sample** display shows an example of the batch number with the format options you select. If this display does not show the batch number as you want it to appear, modify the settings on this page.
11. After you change business rules, your changes are updated right away.

The Life of a Batch

This chapter explains each step in the life of a constituent batch and provides examples and procedures for each process. Regardless of whether you use a constituent, gift, or time sheet batch, every batch goes through the following steps.

Setup. Before you add constituents to a batch, you must set up a batch. To set up a batch, select a batch number, define the fields to enter for each constituent, and specify any necessary defaults for these fields. For example, to create a constituent batch to add the names and addresses of new prospects to the database, select the appropriate name and address fields when you set up the batch. For more information about how to set up a constituent batch, see “Constituent Batch Setup” on page 17.

Note: The program uses a batch number to identify a specific batch. Each constituent, gift, and time sheet batch must have a unique batch number.

Data Entry grid. The Data Entry grid is a spreadsheet. Every field you select to appear in the batch has a column in the spreadsheet. When you add a constituent batch, you add each new constituent on a separate row. For more information about how to enter data into a constituent batch, see “Constituent Batch Data Entry” on page 35.

Validation. When you finish adding constituents to your batch, you can validate the batch. When you validate a batch, *The Raiser’s Edge* determines if errors in data entry will prevent constituents in the batch from being added to your database successfully. We strongly recommend you validate a batch before or while you commit it to the database. For more information about how to validate a constituent batch, see “Validating a Batch” on page 60.

Commit a batch to the database. When you commit a constituent batch to the database, the program transfers the information entered in the batch to create new constituent records. For more information about how to commit a constituent batch, see “Committing a Batch” on page 62.

Constituent Batch Setup

To use *Batch* to add constituents to your database, you must first define basic information about the batch. This information includes the batch number, the fields present in the batch, and defaults for these fields. When you click **New Constituent Batch** on the Batch page to create a new constituent batch, the Constituent Batch Setup screen appears so you can view and define basic information about the batch.

Constituent Batch Setup

1: Batch Header | 2: Fields | 3: Defaults

Batch Statistics			
Number of constituents:	5	Last committed on:	
Created on:	02/21/2005 8:29:39 AM	Created by:	Supervisor
Last changed on:	02/21/2005 10:59:25...		

Batch number: 8

Description: Prospects obtained from the Open House on 02/10/2005

☒ Other users may access this batch

< Back Next > Cancel Save Data Entry

The Constituent Batch Setup screen is divided into three tabs: Batch Header, Fields, and Defaults. At the bottom of each tab, several buttons are available to help you move between the tabs. For more information about the buttons on this screen, see “Buttons” on page 8.

Batch Header Tab

On the Batch Header tab, you select a batch number and enter a description to explain the contents of the batch. This tab also displays **Batch Statistics**, such as the number of constituents in the batch and the name of the user who created the batch.

The screenshot shows the 'Constituent Batch Setup' dialog box with the 'Batch Header' tab selected. The 'Batch Statistics' section displays the following information:

Batch Statistics			
Number of constituents:	5	Last committed on:	
Created on:	02/21/2005 8:29:39 AM	Created by:	Supervisor
Last changed on:	02/21/2005 10:59:25...		

Below the statistics, the 'Batch number' is set to 8, and the 'Description' is 'Prospects obtained from the Open House on 02/10/2005'. The checkbox 'Other users may access this batch' is checked. At the bottom, there are buttons for '< Back', 'Next >', 'Cancel', 'Save', and 'Data Entry'.

Batch Statistics

At the top of the Batch Header tab, the **Batch Statistics** grid displays a variety of information, such as:

- The number of constituents currently entered in the batch.
- The user name for the person who originally created the batch.
- The date and time the batch was created, last changed, and last committed.

Although you cannot edit this information, the program updates this grid every time you save the batch.

Number of constituents. The **Number of constituents** display shows the number of constituents currently entered in this batch.

Created on. The **Created on** display shows the date and time the batch was first created.

Note: You specify how system dates and times are formatted on the Regional Settings Properties screen. You specify dates in the **Short Date Style** field on the Date tab and times in the **Time Style** field on the Time tab. To access the Regional Settings Properties screen, open the *Windows* Control Panel and click **Regional Settings**.

Last changed on. The **Last changed on** display shows the date and time the batch was last changed. Until you save the batch for the first time, a date and time do not appear in the **Last changed on** display. Every time you save the batch, the date updates. If the batch is open on more than one workstation, the **Last changed on** display shows the date and time the main database was last updated.

Last committed on. The **Last committed on** display shows the date the batch was last committed to the database. A date does not appear in this field until you commit the batch.

Created by. The **Created by** display shows the user name of the person who originally created the batch. For example, if this batch was created by the Supervisor, “Supervisor” appears in this display.

Batch Numbers

The Raiser’s Edge tracks each constituent, gift, and time sheet batch with a unique number, called a batch number. When you create a new batch, the program automatically generates a batch number and assigns it to the batch. You can choose to use this number or select your own number. If you select your own number, you can assign numbers and letters to the batch you create.

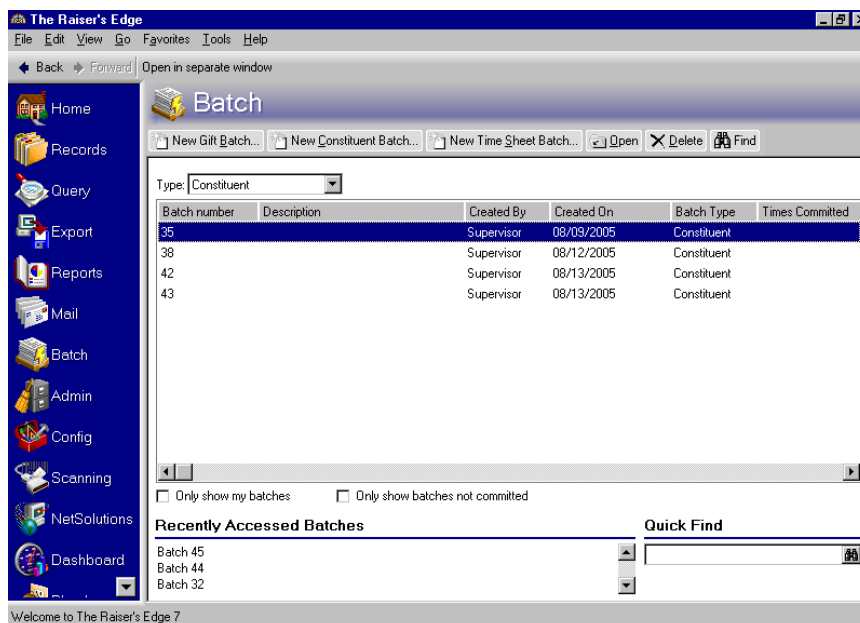
When the program generates a batch number, it selects the lowest unused batch number and formats the batch number based on specifications you enter in *Configuration*. To define this format, click **Business Rules** on the *Configuration* page. For information about how to define the batch number format, see “Defining the batch number format” on page 15. If you select your own batch number, verify that this batch number has not been used for another gift or constituent batch. For information about how to verify the batch number has not been used, see “Determining whether a batch number has been used” on page 19. Regardless of how you select the batch number, it must be unique for each batch you create.

When you open a batch, the batch number appears in the top corner of the screen. When you click on the Batch page, the batch number appears next to each corresponding batch in the grid. From a gift record, you can determine which batch number is associated with a specific gift. Open the gift record and select **File, Properties** from the menu bar. The batch number is listed on the Properties screen.

► Determining whether a batch number has been used

Each constituent, gift, and time sheet batch must have a unique batch number. If you select your own batch number, you need to determine whether the batch number has been used for another batch.

1. On the Raiser’s Edge bar, click **Batch**. The Batch page appears.




2. Click **New Constituent Batch**. The Constituent Batch Setup screen appears.

3. Select the Batch Header tab.

Constituent Batch Setup

1: Batch Header | 2: Fields | 3: Defaults

Batch Statistics			
Number of constituents:	0	Last committed on:	
Created on:	09/06/2005 11:20:22...	Created by:	Supervisor
Last changed on:	09/06/2005 11:20:22...		

Batch number: 32 

Description: Prospects obtained from the Open House on 09/06/2005.

☒ Other users may access this batch

Press F7 to zoom

< Back | Next > | Cancel | Save | Data Entry

4. Click the batch number lookup button next to the **Batch number** field. The Open screen for batches appears.

Open

Find: Batch

OK
Cancel

Options

Find Batches that meet these criteria:

Batch number: Created on:

Batch description: Created by:

Batch type: Constituent Last committed on:

☐ Exact match only ☐ Display recurring batches

☐ Display only open batches ☐ Include for bank deposit?

Find Now
New Search
Expand Results

Note: To access a complete list of used batch numbers, you can also leave the criteria fields blank and click **Find Now**.

5. In the **Batch number** field, enter the batch number to verify and click **Find Now**. For example, to determine whether “4” has been used as a batch number, enter “4” in the **Batch number** field and click **Find Now**. If you cannot locate a batch associated with this number, the batch number has not been used before and you can use it for the new batch you are creating.

The screenshot shows the 'Open' dialog box with the following details:

- Find:** Batch
- Batch Number:** 4
- Batch Description:** (empty)
- Batch Type:** Gift
- Date Added:** 11/08/2005
- Ad Supervisor:** (empty)
- Find Batches that meet these criteria:**
 - Batch number: 4
 - Batch description: (empty)
 - Batch type: Gift
 - Created on: (empty)
 - Created by: (empty)
 - Last committed on: (empty)
 - ☐ Exact match only
 - ☐ Display only open batches
 - ☐ Display recurring batches
 - ☐ Include for bank deposit?
- Find Now** button
- New Search** button
- Expand Results** button
- 1 record found.**

6. After you verify whether the batch number has been used, click **OK** to return to the Batch Header tab of the Constituent Batch Setup screen.

Batch Description and Access

Note: In the **Description** box, you can enter up to 255 characters to describe the contents of the batch.

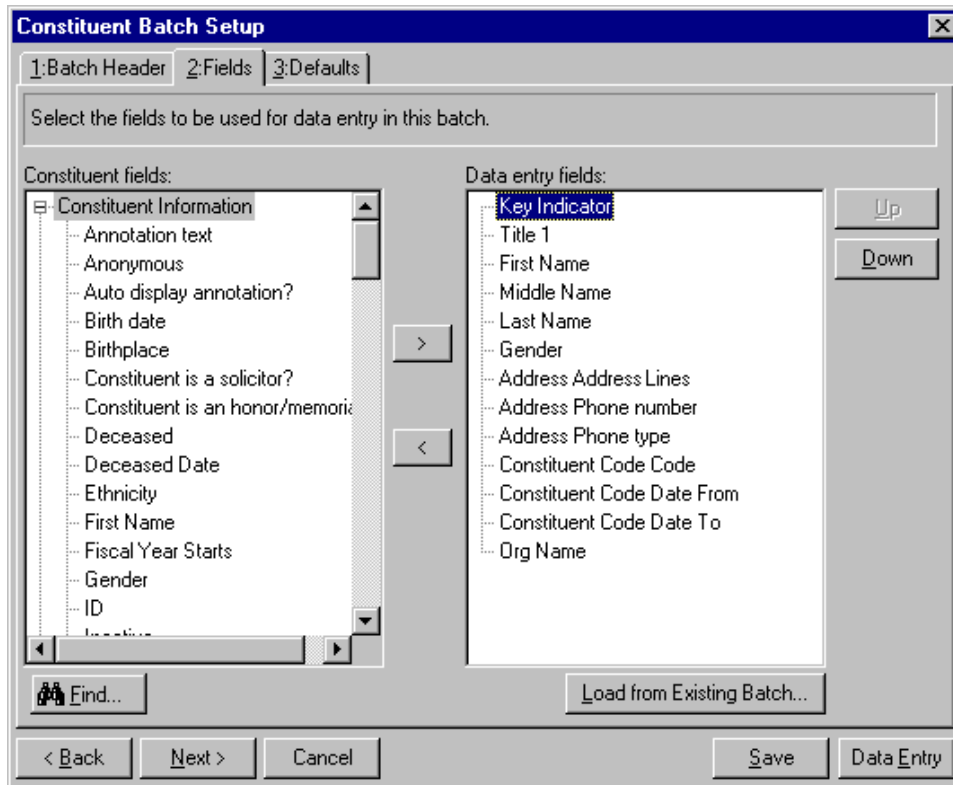
A batch description explains why you add the individuals or organizations as constituents in your database. For example, you can enter the description “Prospects obtained from Prospect Direct Mailing sent on 2/5/2005.” This description appears on the Open screen so you can determine the purpose for the batch before you open it. We recommend you add a description so you can quickly find a particular batch.

When you create a batch, you can enable others to use and enter information into the batch. To enable other to use and enter information, mark **Other users may access this batch**. If a batch contains sensitive information, such as a constituent’s net worth or credit card numbers, you may not want to mark this checkbox and limit batch access to the person who created the batch.

Fields Tab

Note: You can use shortcut keys to move around *The Raiser’s Edge* without the use of your mouse. For example, press **ALT + 2** on your keyboard to select the Fields tab or **ALT + 3** to select the Defaults tab.

On the Fields tab, you can select the fields to appear on the Data Entry screen for the constituent batch. For example, if you create a constituent batch to enter new prospect names and addresses, you can use the Fields tab to select the appropriate name and address fields for which you want to add information.



Note: The **Constituent fields** box displays a list of all fields available to include in a constituent batch. When a + symbol appears next to an entry in the **Constituent fields** box, click the + symbol to view a list of field names grouped under the heading. The **Data entry fields** box displays all fields you selected to appear on the Data Entry screen for the constituent batch.

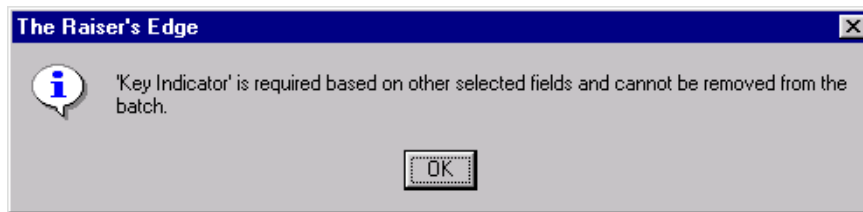
You can use action fields in a constituent batch to add advocacy actions to your database. For example, you can use the **Action Date** and **Delivery Method** fields to track actions related to advocacy activities. For more information about advocacy actions, see the Actions chapter of the *Constituent Data Entry Guide*.

Required Fields for Constituent Batches

Note: The **Key Indicator** field determines whether the constituent record is for an individual or an organization.

The **Key Indicator**, **Last Name**, and **Org Name** fields automatically appear in the **Data entry fields** box because these fields are required for all constituent batches. Also, the program automatically includes any fields made required with the **Fields** link in *Configuration*. For example, if you make **Birth date** a required field, you must include the **Birth date** field in all constituent batches. For more information about how to designate required fields, see the *Configuration & Security Guide*.

If you attempt to remove a required field, such as **Key Indicator**, from the **Data entry fields** box, you receive a message that indicates you cannot remove a required field from the batch.



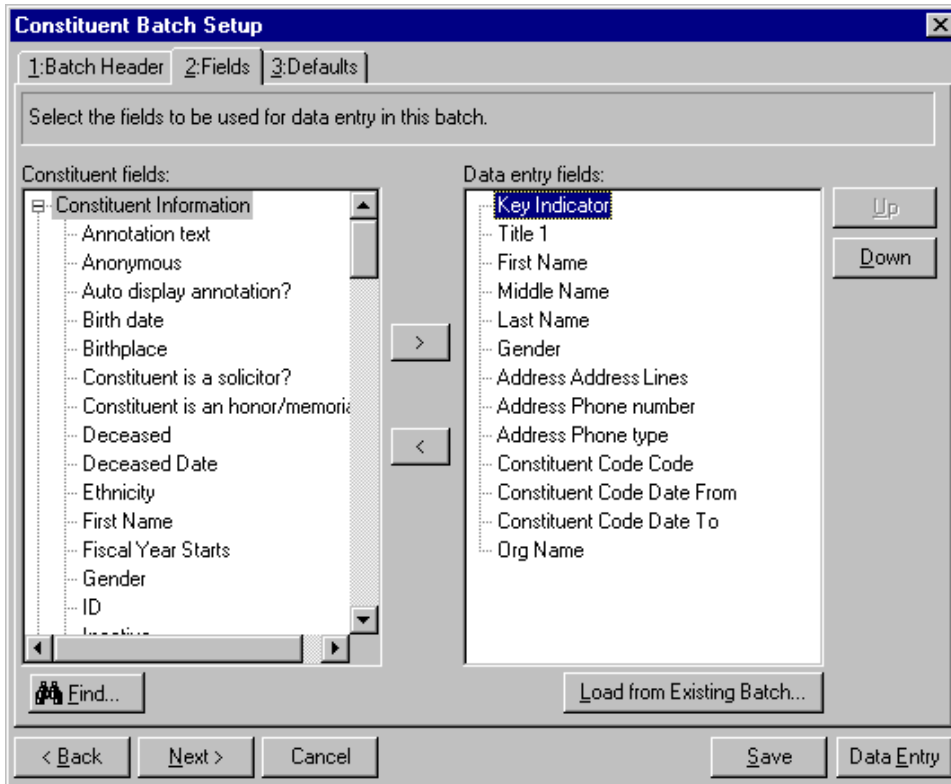
Selecting Fields for a Constituent Batch

To include a field in a constituent batch, highlight the field in the **Constituent fields** box and click the right arrow to move the field to the **Data entry fields** box. For example, to include the **Birth date** field, highlight **Birth date** in the **Constituent fields** box and click the right arrow to move it to the **Data entry fields** box. The order you list the fields in the **Data entry fields** box is the order the program displays the fields on the Data Entry screen. To change the order of the fields, select a field in the **Data entry fields** box and click the **Up** or **Down** button to move the field to the appropriate location.

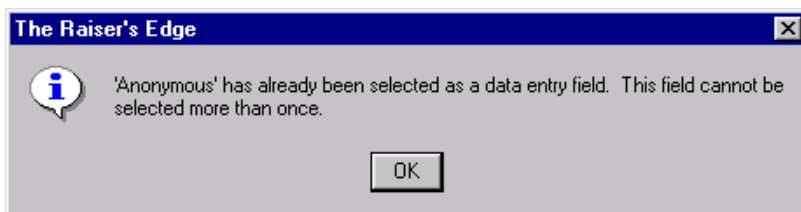
On occasion, you may need to enter multiple entries for a field on a constituent record. For example, a constituent may have several phone numbers, such as Home, Business, and Alternate. To enter multiple phone numbers for a constituent, you must include the **Phone number** field in the batch more than once. For example, to enter a Home and Alternate phone number for each constituent, you must include the **Phone number** field twice in the batch.

Note: We strongly recommend you enter a constituent ID, address, phone number, and constituent code for every constituent in your database.

Because you can include many fields in a batch more than once, fields do not disappear from the **Constituent fields** box when you include them in the batch. The first time you include a field, the field name appears in the **Data entry fields** box as usual. When you select the field again, the field name and selection number appear in the **Data entry fields** box. For example, if you include the **Phone number** field twice, **Address Phone number** and **Address Phone number2** appear in the **Data entry fields** box.



Some fields cannot be included in a batch more than once. For example, if you include the **Anonymous** field in the batch, then attempt to include the **Anonymous** field again, you receive a message that indicates the field is already included in the batch.



Tip: You can use the **Find** button to quickly locate fields in the **Constituent fields** box.

When you select certain fields for a batch, other fields automatically appear in the **Data entry fields** box. For example, when you select the **Spouse Gender** field, the **Spouse Last Name** field automatically appears in the **Data entry fields** box.

Creating a Batch Template by Loading Fields from an Existing Batch

Note: If you already entered constituents into the batch, **Load from Existing Batch** is disabled.

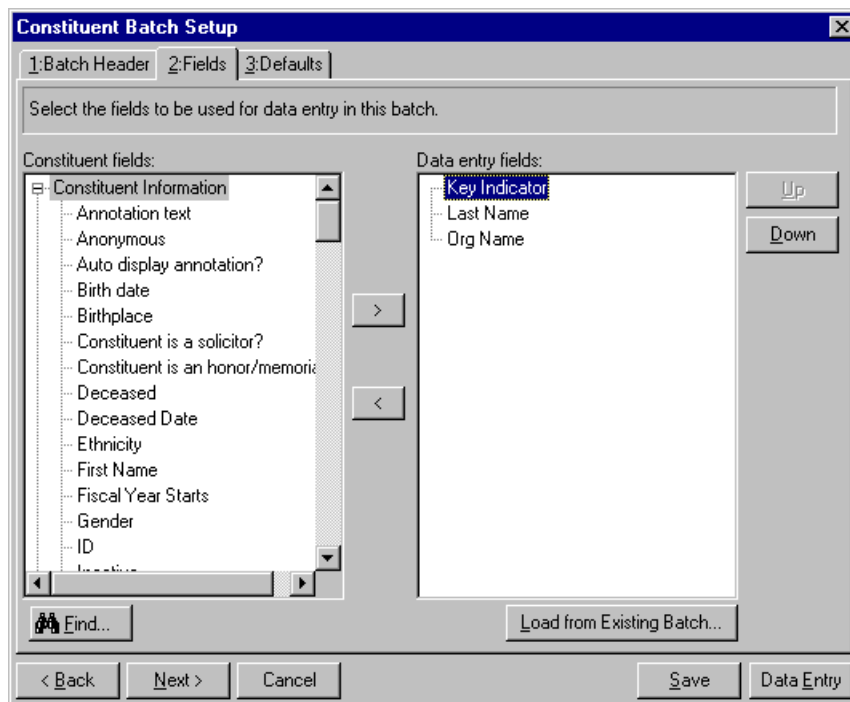
After you select the **Data entry fields** for a batch and save the batch, you can copy the field list to use as a template when you create a new batch. When you copy a field list to a new batch, you basically use an existing batch as the template for your new one. In your new batch, you can also add additional fields and remove unnecessary fields as needed. To copy a field list from another batch, click **Load from Existing Batch** on the Fields tab of the Gift Batch Setup screen. This feature saves you time because you do not need to re-create a field list you already used in another batch. When you load fields from another batch, *The Raiser's Edge* replaces any fields in the **Data entry fields** box with the fields selected in the existing batch. When you click this button, the Open screen for batches appears so you can search for the existing batch from which to copy fields.

► **Creating a batch template by loading fields from an existing batch**

When you load fields from another batch, *The Raiser's Edge* replaces any fields in the **Data entry fields** box with the fields from the selected batch.

Note: To access the Constituent Batch Setup screen from the Data Entry screen, select **Tools, Edit Batch Setup** from the menu bar. To access the Constituent Batch Setup screen for a new batch, click **New Constituent Batch** on the Batch page.

1. From the Constituent Batch Setup screen, select the Fields tab.



Note: If you already entered constituents into the batch, **Load from Existing Batch** is disabled.

2. Click **Load from Existing Batch**. The Open screen appears so you can search for the batch to use to create your new batch template.

The screenshot shows a window titled "Open" with a search bar at the top containing the text "Batch". Below the search bar is a table with the following data:

Batch Number	Batch Description	Batch Type	Date Added	Ad
8	Prospects obtained fr...	Constituent	02/21/2005	Superviso
9		Constituent	02/21/2005	Superviso

Below the table is a section titled "Find Batches that meet these criteria:" with several input fields and checkboxes:

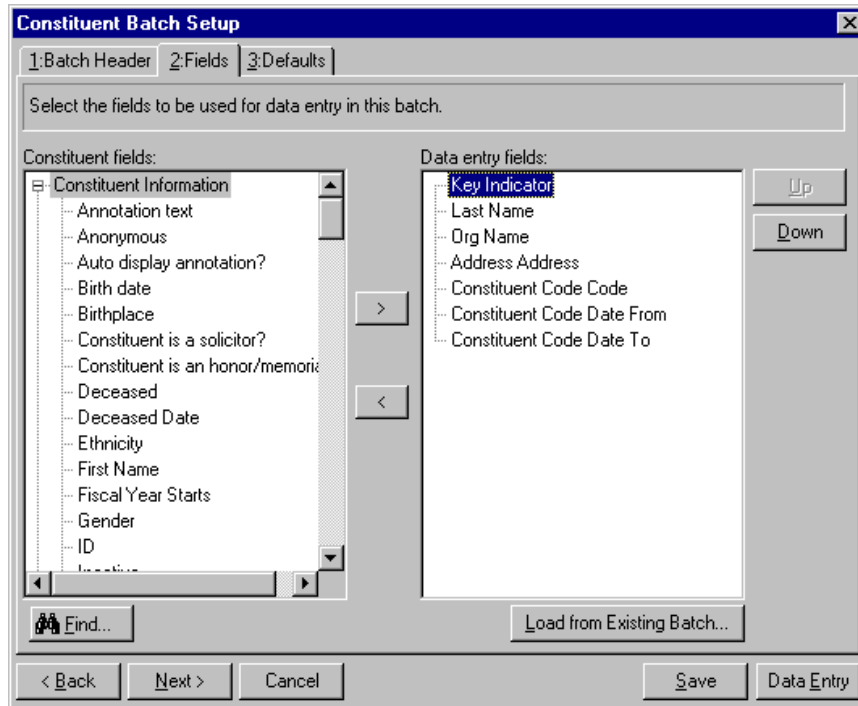
- Batch number: [dropdown]
- Batch description: [dropdown]
- Batch type: Constituent [dropdown]
- Created on: [calendar icon]
- Created by: [dropdown]
- Last committed on: [calendar icon]
- ☐ Exact match only
- ☐ Display recurring batches
- ☐ Display only open batches
- ☐ Include for bank deposit?

At the bottom left, it says "2 records found." On the right side, there are buttons for "Open", "Cancel", "Options", "Find Now", "New Search", and "Expand Results".

Note: In the **Find Batches that meet these criteria** frame, you can enter the first few letters or characters in the criteria fields if you do not know the correct spelling or number. For detailed information about how to use these fields, see the *Program Basics Guide*.

3. On the Open screen for batches, enter information in the criteria fields at the bottom of the screen to help narrow the search and click **Find Now**.
4. When you locate the batch from which you want to create a template, select the batch in the grid.

- Click **Open**. You return to the Fields tab of the Constituent Batch Setup screen. The program copies the field list from the batch you selected to the **Data entry fields** box and therefore provides a template to work with so you do not have to remember which fields you need to add when you work with new batches.



Warning: We recommend you search by one or two of the most helpful criteria types, because the results that appear in the grid must match all the criteria you enter. Too much criteria information in the **Find Batches that meet these criteria** fields can actually prevent you from finding the constituent.

- You can add or remove fields from the **Data entry fields** box, as necessary.
- To begin to add constituents to the batch, click **Data Entry**. For more information about the Data Entry screen, see “Constituent Batch Data Entry” on page 35.

Defaults Tab

Defaults are guidelines you can set up to simplify data entry. For example, if you add only organization records in a constituent batch, you can set the default for the **Key Indicator** field to Organization. Every time you add a new constituent to the batch, the program enters Organization in the **Key Indicator** field. This saves you time because you do not have to select an entry for the **Key Indicator** field for each constituent you add to the batch. After the program enters a default in a field, you can change the default entry to select the text and type over it with the correct entry. If you decide to add an Individual record to the batch while you add constituents to the batch, you can change the default entry of Individual to Organization.

Note: The **Key Indicator** field determines whether the constituent record is for an individual or organization.

On the Defaults tab, you can select a default for many of the fields you include in your batch. If you do not want to specify a default value, you can leave any or all fields on this tab blank.

Constituent Batch Setup

1:Batch Header 2:Fields 3:Defaults

You can enter a value in any of the fields below to create a default value for that field.

General

Field	Default Value	Hide?
Key Indicator	Individual	<input type="checkbox"/>
First Name		<input type="checkbox"/>
Middle Name		<input type="checkbox"/>
Last Name		<input type="checkbox"/>
Org Name		<input type="checkbox"/>
ID		<input type="checkbox"/>
Address Address		<input type="checkbox"/>
Address Phone type	Business	<input type="checkbox"/>
Address Phone number		<input type="checkbox"/>
Business Org Name		<input type="checkbox"/>
Business Profession	Banking	<input type="checkbox"/>
Business Position		<input type="checkbox"/>

Up Down

< Back Next > Cancel Save Data Entry

Adding a Default

The Defaults grid displays the fields you selected on the Fields tab of the Constituent Batch Setup screen. To add a default, enter the field entry in the **Default Value** column as you normally would on a constituent record. If one field is dependent on another, you cannot enter a default for the dependent field until you enter a default for the independent field.

The order the fields display on this screen is the order they appear on the Data Entry screen. To change the order, select the field to move and click the **Up** or **Down** button to relocate the field. When you change the field order in the Defaults grid, the order updates in the **Data entry fields** box on the Fields tab.

Hiding a Field

Warning: You cannot hide the **Last Name** field because your entry in this field is different for each constituent you enter.

To add information for a field on a constituent record, you must include the field in the batch. If you enter the same information in a particular field for each constituent in a batch, you may want to add a default and hide the field to reduce the number of fields that appear in the Data Entry grid. For example, your organization hosts an Open House and you want to enter the names of the new prospects in a batch. Your organization records how you receive the name of a constituent as an attribute. You can enter Open House as a default for the **Origin attribute description** field and hide this field because this attribute is the same for all prospects entered in this batch.

To hide a field, mark **Hide?** on the Defaults tab of the Constituent Batch Setup screen. From the Data Entry screen, you can display the hidden columns. From the menu bar, select **View, Hide/Show Columns**. For more information about how to display hidden columns, see “Viewing hidden columns in a batch” on page 54.

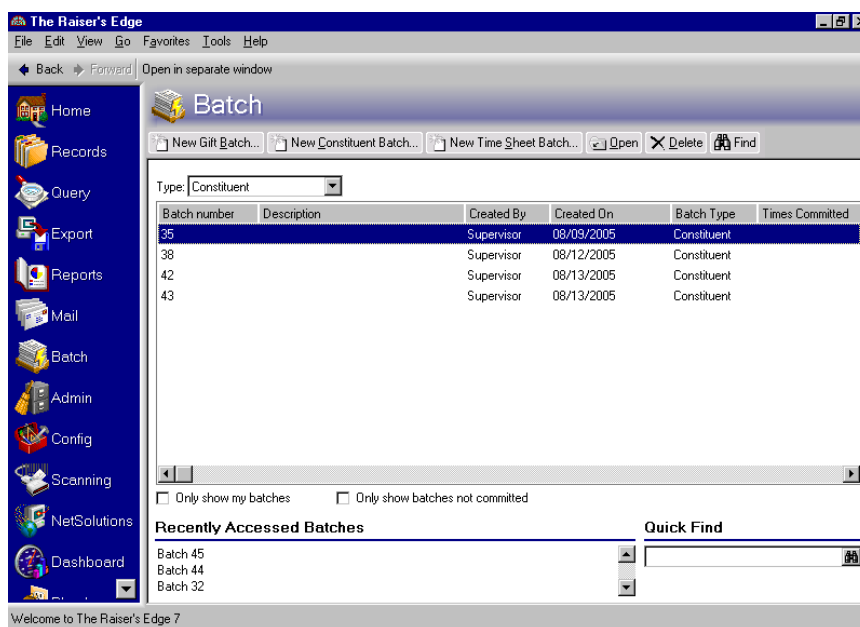
Setting Up a New Constituent Batch

Now that you understand the features and options on the Constituent Batch Setup screen, you can set up a batch to add new constituents to your database.

► Setting up a new constituent batch

Scenario: Your organization just held an open house and you have several new constituents to add to your database as prospects. For these prospects, you want to record their name, constituent ID, address, telephone number, and constituent code on their constituent record.

1. On the Raiser's Edge bar, click **Batch**. The Batch page appears.



Warning: If you do not have security rights to create a constituent batch, **New Constituent Batch** is disabled.

2. Click **New Constituent Batch** at the top of the page. The Constituent Batch Setup screen appears.

Constituent Batch Setup

1:Batch Header 2:Fields 3:Defaults

Batch Statistics	
Number of constituents:	0
Last committed on:	
Created on:	09/06/2005 11:20:22...
Created by:	Supervisor
Last changed on:	09/06/2005 11:20:22...

Batch number: 32

Description:

☒ Other users may access this batch

Press F7 to zoom

< Back Next > Cancel Save Data Entry

3. In the **Batch number** field, the program defaults the next available batch number. For this example, it is not necessary to change the default batch number.

Note: The program formats the batch number in accordance with the settings you selected on the Business Rules page in *Configuration*. For more information about how to define the format for batch numbers, see “Business Rules” on page 14.

4. In the **Description** field, enter “Prospects obtained from the Open House on 09/06/2005”. The description explains why you add the constituents to this batch.

5. Mark **Other users may access this batch**. This batch does not contain sensitive information so it is not necessary to limit access to the user who creates the batch.

Constituent Batch Setup

1: Batch Header | 2: Fields | 3: Defaults

Batch Statistics			
Number of constituents:	0	Last committed on:	
Created on:	09/06/2005 11:20:22...	Created by:	Supervisor
Last changed on:	09/06/2005 11:20:22...		

Batch number: 32

Description: Prospects obtained from the Open House on 09/06/2005.

☒ Other users may access this batch

Press F7 to zoom

< Back | Next > | Cancel | Save | Data Entry

6. Click **Next** at the bottom of the Constituent Batch Setup screen to display the Fields tab. The **Key Indicator**, **Last Name**, and **Org Name** fields automatically appear in the **Data entry fields** box because they are required fields for constituent batches.

Constituent Batch Setup

1: Batch Header | 2: Fields | 3: Defaults

Select the fields to be used for data entry in this batch.

Constituent fields:

- Constituent Information
- Spouse
- Business
- Contact
- Individual Relationship
- Organization Relationship
- Banks
- Education
- Assigned Solicitors
- Actions
- Prospect
- Tribute
- Volunteer

Data entry fields:

- Key Indicator
- Last Name
- Org Name

Find... | Load from Existing Batch...

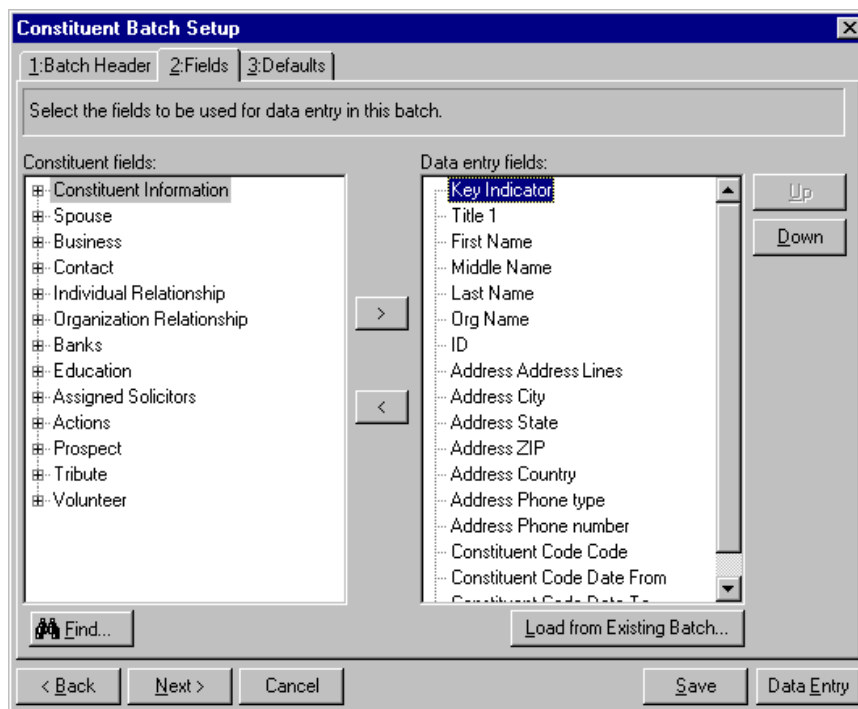
< Back | Next > | Cancel | Save | Data Entry

7. In the **Constituent fields** box, click the plus sign next to **Constituent Information** to view all the fields in this category.

8. Select the **Middle Name**, **First Name**, and **ID** fields in the **Constituent fields** box and click the right arrow to move this field to the **Data entry fields** box. The program moves the fields to the bottom of the list in the **Data entry fields** box.

Note: You can include certain field names more than once. For example, if you include the **Phone type** field twice, the program displays this field name as Phone type and Phone type 2 in the **Data entry fields** box.

9. Use the same selection method to include these fields in this constituent batch: **Address**, **City**, **State**, **ZIP**, **County**, **Phone type**, **Phone number**, **Constituent Code**, **Constituent Code Date From**, and **Constituent Code Date To**.
10. To move the **First Name** and **Middle Name** fields above the **Last Name** field in the **Data entry fields** box, select the fields and click the **Up** button until the fields appears in the correct location. The order you arrange the fields in the **Data entry fields** box is the order the fields appear on the Data Entry screen for the constituent batch. You can move the fields up or down according to your preference.



Note: You can use shortcut keys to move around *The Raiser's Edge* without the use of your mouse. For example, to select the Defaults tab, press **ALT + 3** on your keyboard.

11. To display the Defaults tab, click **Next** at the bottom of the screen. The Defaults grid displays all the fields you selected on the Fields tab.

Constituent Batch Setup

1: Batch Header | 2: Fields | 3: Defaults

You can enter a value in any of the fields below to create a default value for that field.

General

Field	Default Value	Hide?
Key Indicator	Individual	<input type="checkbox"/>
Title 1		<input type="checkbox"/>
First Name		<input type="checkbox"/>
Middle Name		<input type="checkbox"/>
Last Name		<input type="checkbox"/>
Org Name		<input type="checkbox"/>
ID		<input type="checkbox"/>
Address Address Lines		<input type="checkbox"/>
Address City		<input type="checkbox"/>
Address State		<input type="checkbox"/>
Address ZIP		<input type="checkbox"/>
Address Country		<input type="checkbox"/>

< Back Next > Cancel Save Data Entry

12. In the **Default Value** column, select “Home” as the default for the **Phone type** field because all the constituents you enter gave a home phone number.

Warning: Only hide a field if you enter a default, and you do not expect the value of this default to change for any constituent entered in the batch.

13. In the **Hide?** column, mark the checkbox in the **Phone type** row to hide the **Phone type** field. When you hide a field, the field does not appear on the Data Entry screen for the batch.

Constituent Batch Setup

1: Batch Header | 2: Fields | 3: Defaults

You can enter a value in any of the fields below to create a default value for that field.

General

Field	Default Value	Hide?
Org Name		<input type="checkbox"/>
ID		<input type="checkbox"/>
Address Address Lines		<input type="checkbox"/>
Address City		<input type="checkbox"/>
Address State		<input type="checkbox"/>
Address ZIP		<input type="checkbox"/>
Address Country		<input type="checkbox"/>
Address Phone type	Home	<input checked="" type="checkbox"/>
Address Phone number		<input type="checkbox"/>
Constituent Code Code	Prospective Donor	<input checked="" type="checkbox"/>
Constituent Code Date From		<input type="checkbox"/>
Constituent Code Date To		<input type="checkbox"/>

< Back | Next > | Cancel | Save | Data Entry

14. In the **Default Value** column, select “Prospective Donor” as the default for the **Constituent Code Code** field.
15. In the **Default Value** column, enter today’s date as the default for the **Constituent Code Date From** field.
16. To save the information entered on the Constituent Batch Setup screen and display the Data Entry screen for this constituent batch, click **Data Entry**. For more information about how to add constituents to the batch, see “Constituent Batch Data Entry” on page 35.

Constituent Batch Data Entry

After you select the fields and defaults for the batch on the Constituent Batch Setup screen, click **Data Entry** to display the Data Entry screen for the constituent batch.

Key Indicator	Title 1	First Name	Middle Name	Last Name	Org Name	ID	Address Address.	Address City	Address State
Individual									
Individual	Mr.	Frank		Pierce		5692	402 Valley Brook ...	Athens	GA
Individual	Ms.	Alison		Roger		5693	506 North Murra...	Charleston	SC
Individual	Mrs.	Margo		LaRue		5694	11 Peachtree Court	Atlanta	GA
Individual	Mr.	Jason		Hills		5695	453 Chimney Lane	Montgomery	AL

There are three main areas on the Data Entry screen: the Default Row, the Data Entry grid, and the Status bar.

Default Row

Note: To easily differentiate the Default Row from the other rows in the Data Entry grid, we strongly recommend you display the Default Row in a different color than the Data Entry grid.

When displayed, the Default Row is the first row in the Data Entry grid and contains the default values you select on the Defaults tab of the Constituent Batch Setup screen. When you add constituents to the batch, any information entered in the Default Row appears as a default for each new constituent in the batch. In User Options, you can display or hide the Default Row, choose a color in which to display this row, and select how to add the defaults for each constituent.

Before you begin to enter data in a constituent batch, select in User Options how to enter defaults in the batch. There are three ways to enter defaults in the batch. In a field, you can press **F2** to add the default for that field, insert a default when you select a field, or insert all available defaults when you begin a new row in the batch. The Default Row is a tool to easily see and change the current defaults for a batch.

When you display the Default Row, you can type over the default you want to change in the Default Row to change the defaults. When you change the values in the Default Row, the changes update on the Defaults tab of the Constituent Batch Setup screen. If you change an entry in the Default Row after you enter constituents in the batch, the new default settings affect the constituents entered after you make the change. The new default settings do not affect constituents already in the batch. For more information about how to display the default row, see “User Options” on page 9.

Data Entry Grid

In the Data Entry grid, each row in the spreadsheet that contains information becomes a constituent record when you commit a batch to the database.

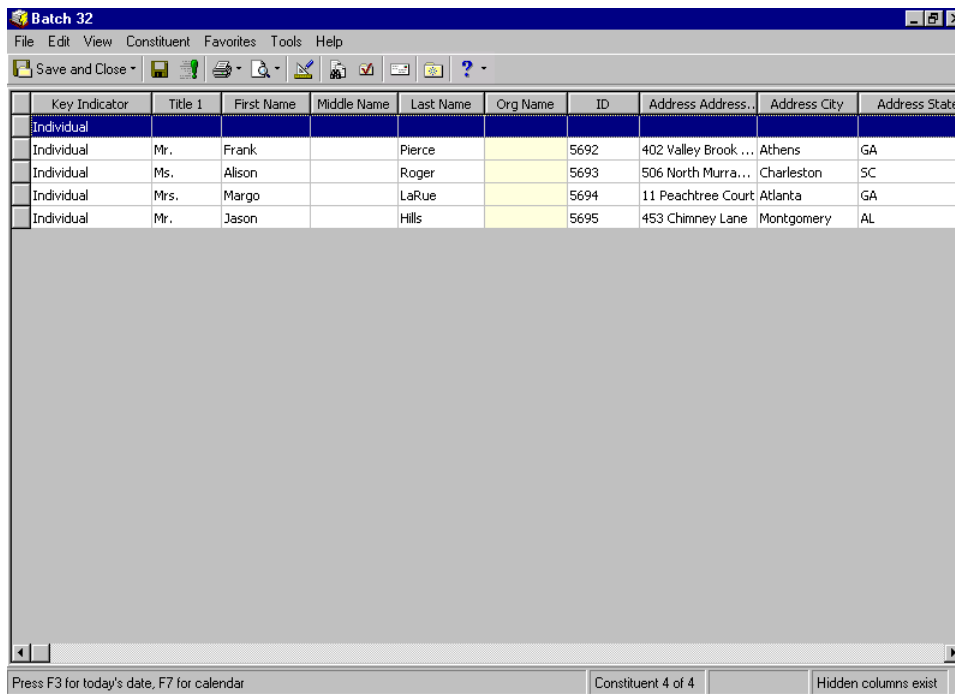
	Key Indicator	Title 1	First Name	Middle Name	Last Name	Org Name	ID	Address Address..	Address City	Address State
	Individual									
	Individual	Mr.	Frank		Pierce		5692	402 Valley Brook ...	Athens	GA
	Individual	Ms.	Alison		Roger		5693	506 North Murra...	Charleston	SC
	Individual	Mrs.	Margo		LaRue		5694	11 Peachtree Court	Atlanta	GA
	Individual	Mr.	Jason		Hills		5695	453 Chimney Lane	Montgomery	AL

When you set up a constituent batch, you define the columns that appear in the Data Entry screen from the Fields tab of the Constituent Batch Setup screen. The columns list in the order you select on the Fields tab. For more information about the Fields tab, see “Fields Tab” on page 21.

When a column is not applicable to the constituent you enter, the field is locked and appears in the color you select in the **Locked cell color** field on the Color tab of User Options. For example, when you add an organization constituent record, individual fields, such as **Marital status**, are not applicable to this record. Any organization fields are locked and appear in the color you select for a locked cell.

Status Bar

The status bar at the bottom of the Data Entry screen displays helpful information about the constituents entered in the batch. It is divided into three sections.



- The first section of the status bar displays messages related to data entry. For example, when you have focus in the **Title 1** field, this section of the status bar displays “Press F7 for table lookup”.
- The second section of the status bar displays the row number for the active row versus the total number of constituents in the batch. For example, if you enter 40 constituents in a batch and select the row for the tenth constituent listed in the batch, “Constituent 10 of 40” appears in this section of the status bar. The total number of constituents in the batch updates every time you complete the entry for a constituent.
- When you hide one or more columns in the Data Entry grid, the last section of the status bar displays the message “Hidden columns exist”. You can hide columns on the Defaults tab of the Constituent Batch Setup screen, or select **View, Hide/Show Columns** from the menu bar. For more information, see “Hiding a column in a batch” on page 53. If you do not hide any columns in the batch, no message appears in this section of the status bar.

Adding Constituents in the Data Entry Grid

After you set up a batch, you can begin to add constituents in the Data Entry grid. There is no limit to the number of constituents you can enter in a batch. However, we recommend you commit the batch at a regular interval.

► Adding constituents to the data entry grid

Scenario: You received a list of potential donors from your Open House. Set up a batch to add them to your database. The first constituent you want to add is Frank Pierce, who lives at 402 Valley Brook Drive, Athens, GA 30606. Frank's home phone number is 706-555-1363 and his ID is 5692.

Scenario: Before you can add new constituents to a batch, you must set up the batch. Select the batch number and the fields and defaults you want to include in the batch. This scenario uses the batch set up in "Setting up a new constituent batch" on page 29.

Note: The first row of the batch may display the Default Row. When you add constituents to a batch, add the constituent information in the rows below the Default Row. For more information, see "Default Row" on page 35.

1. From the Batch page, open the constituent batch with the description "Prospects obtained from the Open House on 09/06/2005." For more information about how to open a constituent batch, see "Accessing a Constituent Batch" on page 6. The Data Entry screen appears for the constituent batch.

Key Indicator	Title 1	First Name	Middle Name	Last Name	Org Name	ID	Address Address.	Address City	Address State
Individual	Mr.	Frank		Pierce		5692	402 Valley Brook ...	Athens	GA

Note: To move from field to field in the Data Entry grid, use the arrow keys in conjunction with the Control key on your keyboard. For example, **<CTRL> + RIGHT ARROW KEY** moves your cursor to the right.

2. On the first row, select "Individual" in the **Key Indicator** column because you to add a new individual constituent record for Frank Pierce.
3. In the **Title 1** column, enter "Mr.".
4. In the **First Name** column, enter "Frank".
5. In the **Last Name** column, enter "Pierce".

Note: Auto Complete occurs when you type the first few letters of information in a field, and the rest of the information automatically defaults in. For example, if you type "M" in the **Marital status** field, then "Married" automatically defaults.

6. In the **ID** column, enter "5692".

7. In the **Address Address Lines** column, enter “402 Valley Brook Drive”. For more information about how to add addresses, see the *Constituent Data Entry Guide*.
8. In the **Address City** column, enter “Athens”.
9. In the **Address State** column, enter “GA”.
10. In the **Address ZIP** column, enter 30606.
11. In the **Address Country** column, enter “United States”.

Address Address	Address City	Address State	Address ZIP	Address Country	Address Phone number	Constituent Code Date From
402 Valley Brook ...	Athens	GA	30606	United States	706-555-1363	09/06/2003

Press F3 for today's date, F7 for calendar

Constituent 1 of 1

Hidden columns exist

12. In the **Phone number** column, enter “706-555-1363”.
13. In the **Constituent Code Date To** field, enter the date one year from today because your organization has mandated that a constituent remain a prospect for one year.

Address State	Address ZIP	Address Country	Address Phone number	Constituent Code Date From	Constituent Code Date To
GA	30606	United States	706-555-1363	09/06/2002	09/06/2003

Press F3 for today's date, F7 for calendar

Constituent 1 of 1

Hidden columns exist

Note: When you add or edit credit card information in a batch, *The Raiser's Edge* automatically sends the credit card information to the Blackbaud *Payment Service* when you leave the row. Depending on your Internet connection, you may experience a slight delay. After *The Raiser's Edge* securely stores the credit card information, only the last four digits of the credit card number appear in the row.

14. To create a new row so you can add the next constituent to the batch, press **TAB** on your keyboard.
15. With the same methods you used to add Frank Pierce to the batch, add additional constituents.
 - Ms. Alison Roger, who lives at 506 North Murray Drive, Charleston, South Carolina, 29406. Alison's home phone number is 843-555-8542 and her ID is 5693.
 - Mrs. Margo LaRue, who lives at 11 Peachtree Court, Atlanta, Georgia, 30335. Margo's home phone number is 404-555-4234 and her ID is 5694.
 - Mr. Jason Hills, who lives at 453 Chimney Lane, Montgomery, Alabama, 36110. Jason's home phone number is 205-555-5274 and his ID is 5695.
16. To save the information you entered in the batch and close the Data Entry screen, click **Save and Close** on the toolbar.

Data Entry Screen Menu Options

This section contains basic procedures for the Data Entry screen menu, such as to add and remove fields from a constituent batch, and hide and freeze columns in the Data Entry grid. For information about general menu options, see the *Program Basics Guide*.

Selecting, Inserting, and Deleting Rows from the Data Entry Grid

You can use the procedures below to select, insert, and delete rows in a constituent batch. It is useful to select rows to insert or delete rows or export data to another application. It is useful to insert rows in a constituent batch to enter constituent information in the batch in a certain order. To maintain the order, you may need to insert a row in the batch. You can also easily delete rows in a batch. For example, you may need to delete a new constituent row because you accidentally added the constituent in the batch twice.

► Selecting rows from the Data Entry grid of a batch

Note: To select a row, you can also click on the gray square to the left of the row.

1. From the Data Entry screen of a batch, click in the row you to select, and select **Edit, Select Row** from the menu bar. The row appears selected. For more information about how to open a constituent batch, see “Accessing a Constituent Batch” on page 6.

Key Indicator	Title 1	First Name	Middle Name	Last Name	Org Name	ID	Address Address.	Address City	Address State
Individual	Mr.	Frank		Pierce		5692	402 Valley Brook ...	Athens	GA
Individual	Ms.	Alison		Roger		5693	506 North Murra...	Charleston	SC
Individual	Mrs.	Margo		LaRue		5694	11 Peachtree Court	Atlanta	GA
Individual	Mr.	Jason		Hills		5695	453 Chimney Lane	Montgomery	AL

2. To deselect the highlighted row, click in any other row in the Data Entry grid.
3. With your cursor anywhere in the Data Entry grid, select **Edit, Select All Rows**. All rows now appear selected.
4. To deselect the highlighted rows, click anywhere in the Data Entry grid.

► Inserting a row in the Data Entry grid of a batch

1. From the Data Entry screen for a batch, select the row below which you want to insert a new blank row. For more information about how to open a constituent batch, see “Accessing a Constituent Batch” on page 6.

Key Indicator	Title 1	First Name	Middle Name	Last Name	Org Name	ID	Address Address.	Address City	Address State
Individual	Mr.	Frank		Pierce		5692	402 Valley Brook ...	Athens	GA
Individual	Ms.	Alison		Roger		5693	506 North Murra...	Charleston	SC
Individual	Mrs.	Margo		LaRue		5694	11 Peachtree Court	Atlanta	GA
Individual	Mr.	Jason		Hills		5695	453 Chimney Lane	Montgomery	AL

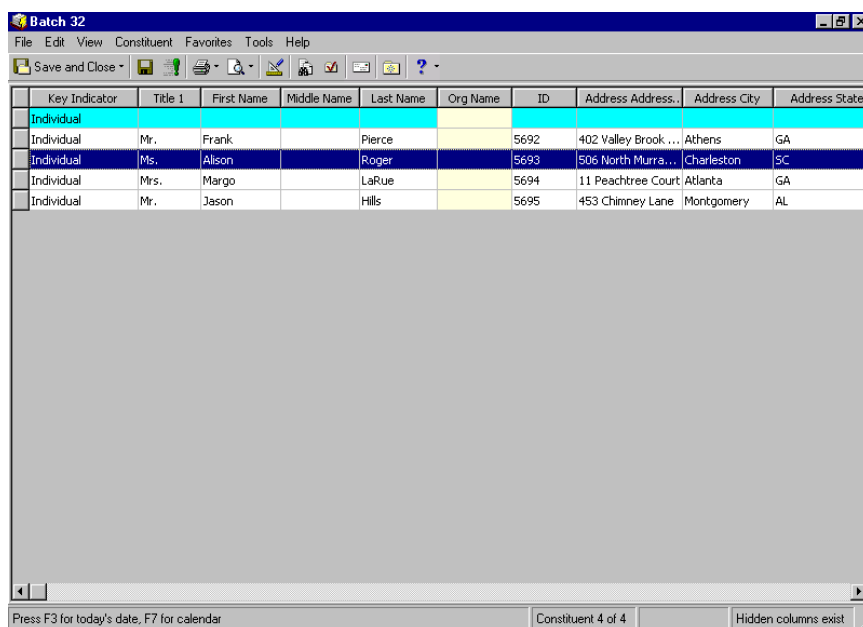
Note: To insert a new row, you can also right-click the selected row to access the shortcut menu. When the shortcut menu appears, select **Insert Row**.

2. From the menu bar, select **Edit, Insert Row**. The blank row appears above the row where you placed your cursor.

► Deleting a row in the batch

Note: To select a row in the Data Entry grid, click the gray square to the left of the row in the Data Entry grid.

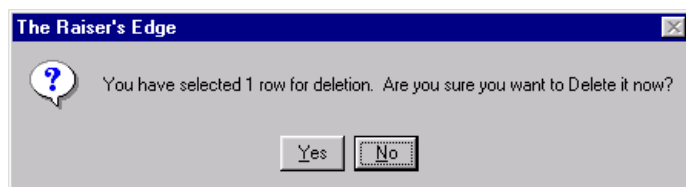
1. From the Data Entry screen for a batch, highlight the row in the batch you want to delete. For more information about how to open a constituent batch, see “Accessing a Constituent Batch” on page 6.



Key Indicator	Title 1	First Name	Middle Name	Last Name	Org Name	ID	Address Address	Address City	Address State
Individual		Frank		Pierce		5692	402 Valley Brook ...	Athens	GA
Individual	Mr.	Alison		Roger		5693	506 North Murra...	Charleston	SC
Individual	Mrs.	Margo		LaRue		5694	11 Peachtree Court	Atlanta	GA
Individual	Mr.	Jason		Hills		5695	453 Chimney Lane	Montgomery	AL

Note: To delete a row, you can also right-click the selected row to access the shortcut menu. When the shortcut menu appears, select **Delete Row**.

2. From the menu bar, select **Edit, Delete Row** to delete the selected row.



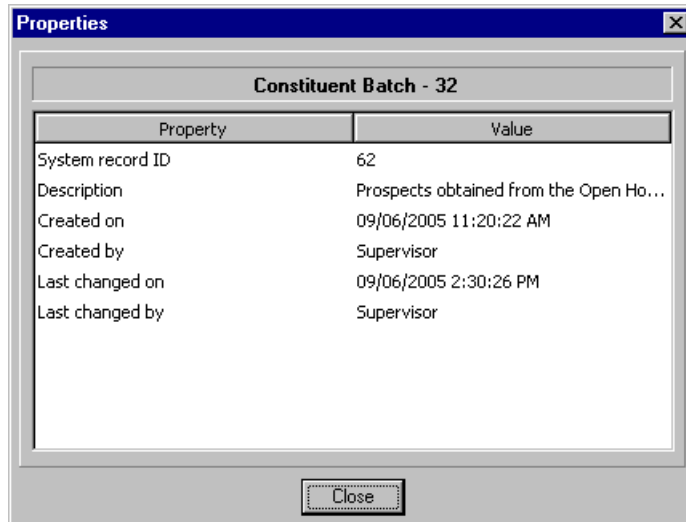
3. To permanently delete the row from the Data Entry grid, click **Yes**.

Viewing Properties for a Constituent Batch

You can easily view the properties for a constituent batch. The Properties screen gives you detailed information about a constituent batch, such as when the batch was created, the system record identification, and who created the batch.

► **Viewing properties for a constituent batch**

1. From the Data Entry screen of a constituent batch, select **File, Properties** from the menu bar. The Properties screen appears. For more information about how to open a constituent batch, see “Accessing a Constituent Batch” on page 6.



2. When you finish viewing the Properties screen, click **Close**. You return to the Data Entry screen of the constituent batch.

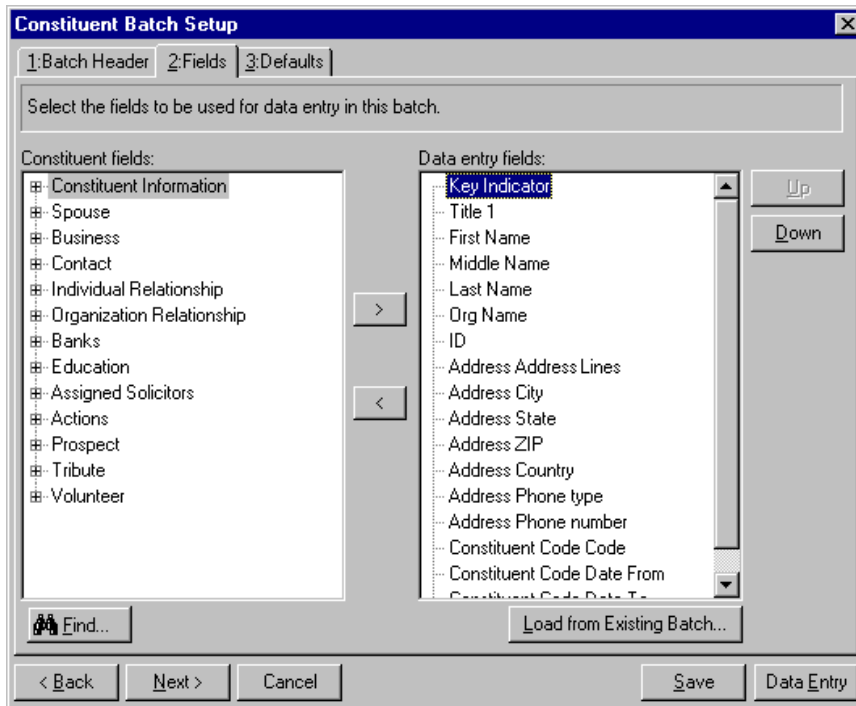
Adding and Removing Fields from a Constituent Batch

You can add and remove fields from a constituent batch after you begin to enter constituent data. When you remove fields that contain data, the data is not retained. If you add the field again, you must reenter the data. For example, if you remove the **Gender** field from a batch, and then add it again, you must reenter the gender for each constituent in your batch.

► **Adding and removing fields from a constituent batch**

1. From the Data Entry screen of a constituent batch, select **Tools, Edit Batch Setup** from the menu bar. The Constituent Batch Setup screen appears. For more information about how to open a constituent batch, see “Accessing a Constituent Batch” on page 6.

2. Select the Fields tab.



3. Add or remove fields as necessary. For example, to add the **Constituent Code** field, select the **Constituent Code** field in the **Constituent fields** box and click the right arrow to move the **Constituent Code** field to the bottom of the **Data entry fields** box. For detailed information about the Fields tab, see “Fields Tab” on page 21.
4. To save your changes and return to the Data Entry screen, click **Data Entry**.

Searching for Duplicate Constituents

When you select a single row from the Data Entry screen of a constituent batch, the **Duplicate Search for []** menu option is available. When you select **Constituent, Duplicate Search for []**, the program searches for duplicate entries for the selected constituent in the database based on the duplicate search criteria specified in *Configuration*. If any duplicates are found, the Duplicate Search Results screen appears.

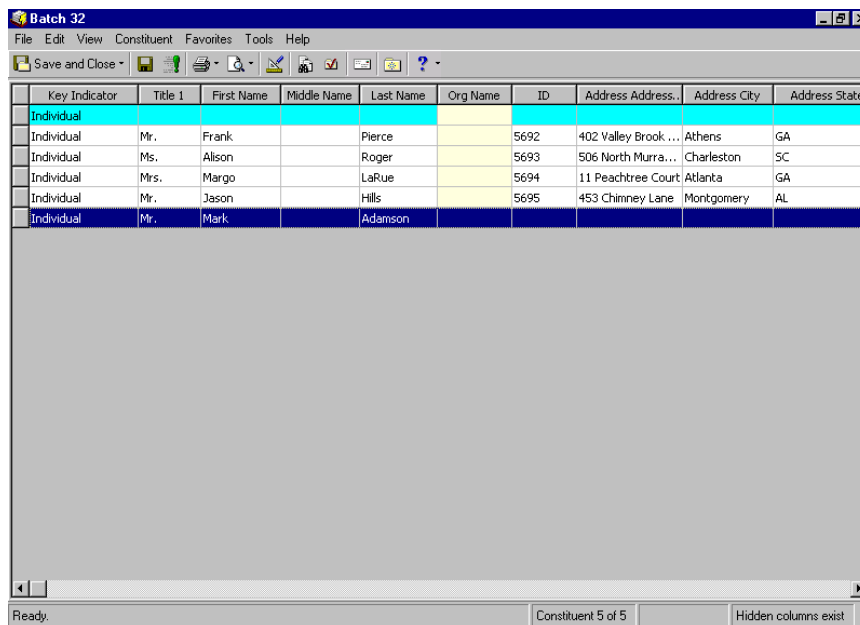
When you are anywhere on the Data Entry screen of a constituent batch and select **Constituent, Duplicate Search for Batch** from the menu bar, the program searches for duplicate entries in the entire batch based on the duplicate search criteria you specified in *Configuration*. If any duplicates in the batch are found, the Duplicate Search Results screen appears. For more information about how to set up duplicate search criteria, see the *Configuration & Security Guide*.

You can also search for duplicate constituents in the database during the validation and the commit process. For more information about how to search for duplicates during the validate or commit processing, see “Validating a Batch” on page 60 or “Committing a Batch” on page 62.

► Searching for a single duplicate constituent

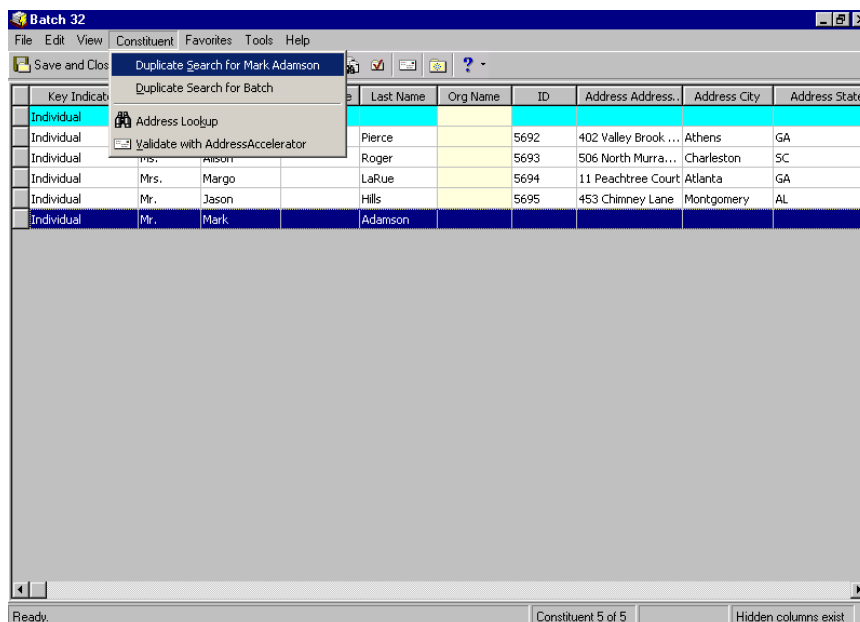
Note: To highlight a row in the Data Entry grid, click the gray square to the left of the row in the Data Entry Grid.

1. From the Data Entry screen of a constituent batch, select the row that contains the constituent who may have a duplicate record. For this example, select the row that contains Mark Adamson.



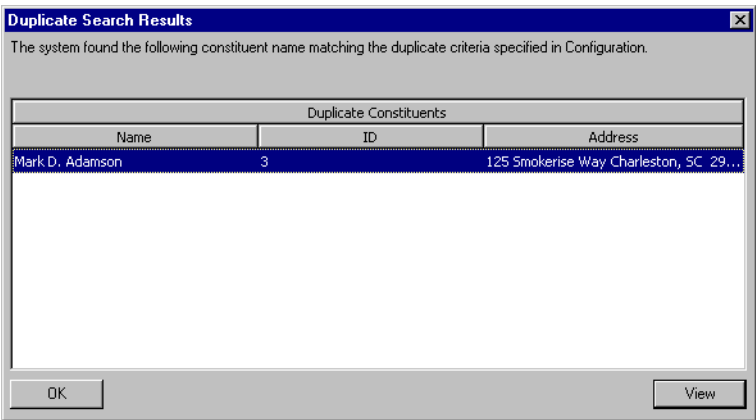
Note: The name of the selected constituent appears in the title for the menu option. For example, if you highlight a row that contains Sarah Mitchell's information, the menu option displays **Duplicate Search for Sarah Mitchell**.

2. From the menu bar, select **Constituent, Duplicate Search for Mark Adamson**.



Note: The program searches only the database for duplicate constituents. If you enter Mark Adamson twice in the same batch, no duplicates are found.

3. If the program finds a duplicate for Mark Adamson, the Duplicate Search Results screen appears and displays possible duplicates.



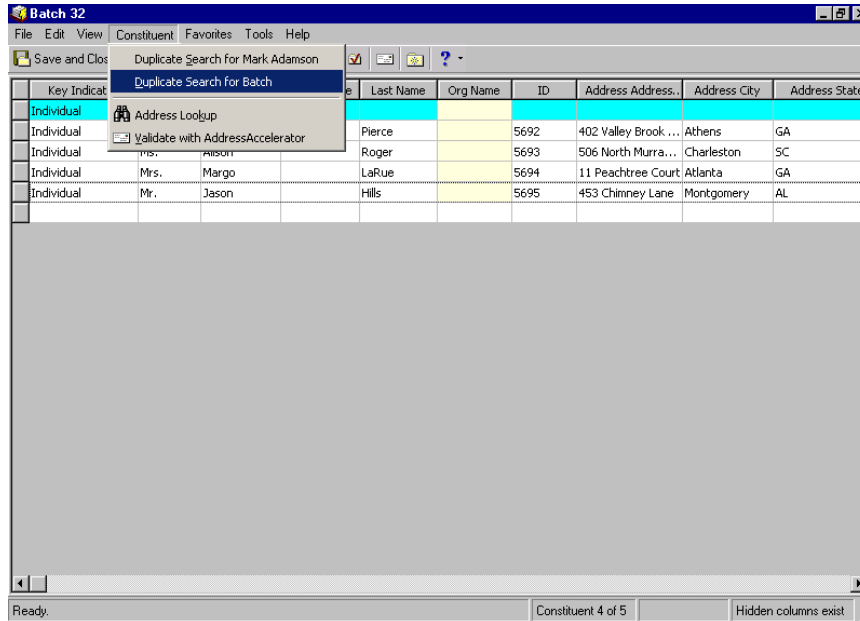
4. To view a constituent record, select the constituent in the **Duplicate Constituents** grid and click **View**. Mark Adamson's constituent record appears so you can determine if the entry duplicates his record.

The screenshot shows a detailed constituent record for "Mark D. Adamson". The window has a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar with various icons. Below the toolbar is a row of tabs: Attributes, Media, Actions, Honor/Memorial, Volunteer, Prospect, Membership, Events, Bio 1, Bio 2, Addresses, Addressees/Salutations, Relationships, Appeals, Notes, and Gifts. The "Addresses" tab is selected. The form is divided into several sections: "Biographical" (Last name: Adamson, First name: Mark, Middle name: Daniel, Titles: Mr., Suffixes: , III, Nickname: , Maiden name: , ID: 3, Gender: Male, SSN: 269-53-1152, Birth date: 09/23/1954, Age: 50, Deceased? checkbox, Marital status: Divorced, Spouse: , Solicit code: Do not phone at work), "Preferred Address : Home" (Country: United States, Address lines: 125 Smokerise Way, City: Charleston, State: SC South Carolina, ZIP: 29401, DPC:), "Phones/Email/Links" (a table with columns DNC, Type, Number/Email Address, and Shared?), and "This constituent" (checkboxes for Is inactive, Gives anonymously, Requests no email, Is a solicitor, Has no valid addresses). At the bottom are buttons for Education, Business (checked), and Bank.

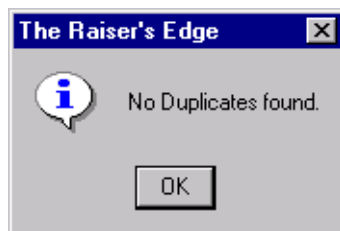
5. Once you view Mark's constituent record, click **Save and Close** on the toolbar to close the constituent record and return to the Duplicate Search Results screen.
6. To return to the Data Entry screen for the constituent batch, click **OK**.
7. If the entry in the batch for Mark Adamson duplicates a record already in your database, delete the row that contains Mark Adamson's information from the batch. For more information about how to delete a row in a batch, see "Selecting, Inserting, and Deleting Rows from the Data Entry Grid" on page 40.

► **Searching for duplicate constituents in the batch**

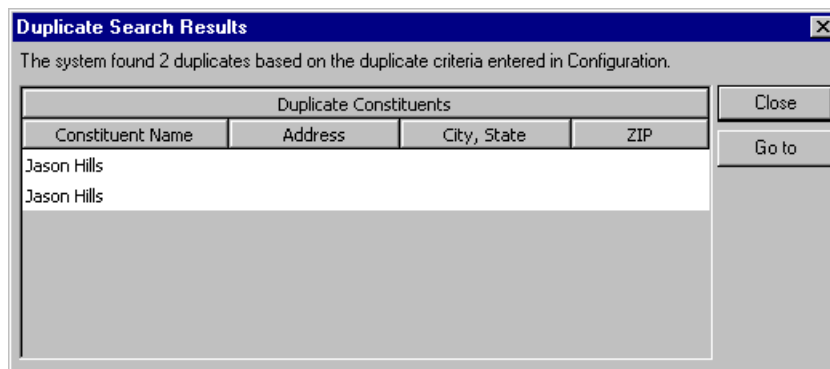
1. From the Data Entry screen of a constituent batch, select **Constituent, Duplicate Search for Batch** from the menu bar. For more information about how to open a constituent batch, see “Accessing a Constituent Batch” on page 6.



The Raiser's Edge searches for duplicate entries in the batch based on the search criteria you specify in *Configuration*. If no duplicate records are found, a message appears.



2. If duplicate entries for a batch are found, the Duplicate Search Results screen appears.



To quickly access a duplicate record, select the duplicate constituent name in the grid and click **Go to**.

3. Click **Close**. You return to the Data Entry screen of the constituent batch.

Accessing and Correcting Addresses for Constituents through a Constituent Batch

Note: Before you use the **Address Lookup** or **Validate with AddressAccelerator** menu options in *Batch*, make sure your *AddressAccelerator* data files are installed and linked correctly in User Options. For more information about how to set up these user options, press **F1** on any AddressAccelerator screen to access the help file.

When you have the address correction service, *AddressAccelerator*, you can search for the city, state, and/or ZIP Code for a constituent's address on the Address Lookup screen. To update a constituent's address in *Batch*, select **Constituent, Validate with AddressAccelerator** from the menu bar of a constituent batch. For more information about *AddressAccelerator*, press **F1** on any AddressAccelerator screen to access the help file.

► Looking up an address for a constituent

Note: You can use shortcut keys to move around *The Raiser's Edge* without the use of your mouse. For example, to access the Address Lookup screen for a batch, press **CTRL + Q** on your keyboard.

1. From a constituent batch, add the constituent information as seen on the screen below. For more information about how to enter constituent information into a constituent batch, see "Adding Constituents in the Data Entry Grid" on page 37.

Key Indicator	First Name	Last Name	ID	Address Address...	Address City	Address State	Address Z
Individual	James	Davidson	1002	5688 Cedar Road	Richmond	VA	

2. In the **Address** field, enter "5688 Cedar Road".
3. In the **City** field, enter "Richmond" and in the **State** field, enter "VA".

- From the menu bar, select **Constituent, Address Lookup**. The Address Lookup screen appears.

City	State	ZIP
RICHMOND	VA	23229
RICHMOND	VA	23249
RICHMOND	VA	23242
RICHMOND	VA	23241
RICHMOND	VA	23240
RICHMOND	VA	23238
RICHMOND	VA	23237

Search criteria:

City:

State:

ZIP:

Buttons: Open, Cancel, Find Now

The available City, State, and ZIP Codes default into the Address Lookup grid.

- Select the appropriate ZIP Code and click **Open**. The ZIP Code you select appears in the **ZIP** field in the batch.

► Correcting an address for a constituent

- From a constituent batch, add the constituent information as seen on the screen below. For more information about how to enter constituent information into a constituent batch, see “Adding Constituents in the Data Entry Grid” on page 37.

Key Indicator	First Name	Last Name	ID	Address Address ...	Address City	Address State	Address ZIP
Individual	Jake	Smith	5599	659 St. Andrews Blvd.	Charleston	SC	30343

Ready. Constituent 1 of 1

Note: You can use shortcut keys to move around *The Raiser's Edge* without the use of your mouse. For example, to access the AddressAccelerator screen for a batch, press **ALT + C, V** on your keyboard.

- In the **Address** field, enter “659 St. Andrews Blvd.”.

3. In the **City** field, enter “Charleston” and in the **State** field, enter “SC”.
4. In the **ZIP** field, enter “30343”.
5. From the menu bar, select **Constituent, Validate with AddressAccelerator**. The AddressAccelerator screen appears.

AddressAccelerator

Current Address Information

Constituent ID:
 Address Type:
 Address: 659 St Andrews Blvd
 City: Charleston
 State: SC
 ZIP: 30343
 County:
 CART:
 LOT:
 DPC:

Choose the 'Update Address' button to update the current address information shown above with the validated address displayed below.

Address: ☐ Add footnote as an address attribute

City:

State: South Carolina Date To Use:

ZIP: DPC: Comment:

County:

CART: LOT:

Note: You can edit the address fields on the AddressAccelerator screen. Enter or change address information in these fields as you like and click **Update Address** to validate the address information you enter.

6. *AddressAccelerator* locates the correct format of the address you specified. To update the mailing address for the constituent, click **Update Address**. You return to the Data Entry grid. The updated address information appears in the constituent row.

7. If the address you type in the address fields in the data entry grid does not exist, the Zip Browser screen appears.

Pre Dir.	Street Name	Suffix	Post Dir.
	ROSLYN	DR	
	ROTHERWOOD	DR	
	ROUNDTABLE	CT	
	ROYAL CASTLE	LN	
	ROYAL PALM	BLVD	
	RUGBY	LN	
	RUNEY	ST	
	RUTLEDGE	AVE	
	RUTLEDGE	BLVD	
	SABIN	ST	
	SAINT ANDREWS	BLVD	

E/O	Primary	Building/Firm	E/O	Secondary	Zip+4	DP/CD
E	512-540				29407-7162	
O	519-599				29407-7160	
E	542-610				29407-7161	
O	601-617				29407-7142	
E	612-632				29407-7170	
O	619-623				29407-7166	
O	625-635				29407-7174	
E	632	REMAX REALTY			29407-7146	
E	634-670				29407-7159	
O	637-699				29407-7165	595
O	655	PSYCHIATRIC SVC			29407-7197	

From the Zip Browser screen, you can lookup states, cities, and street addresses to locate the constituent's correct address information.

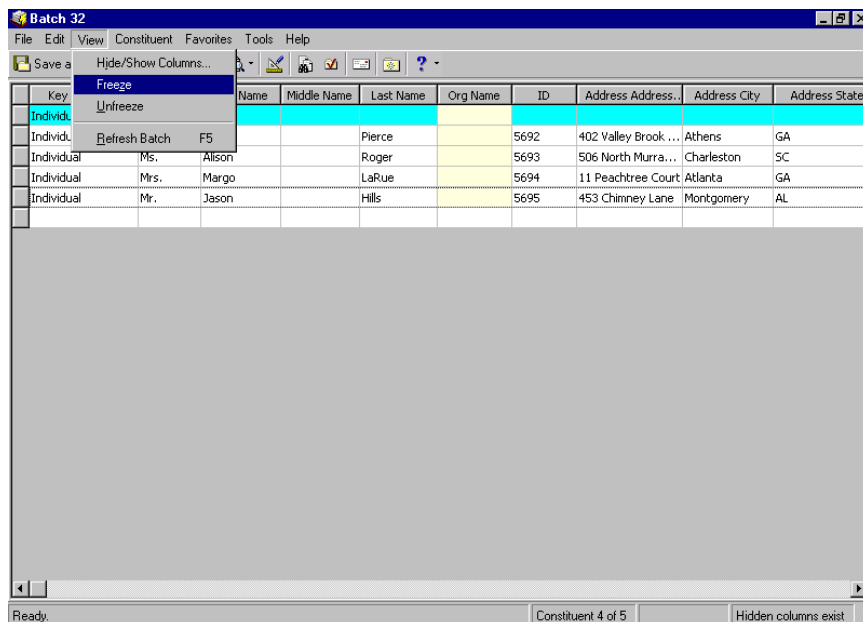
8. Make any necessary selections and click **Update**. If the address cannot be validated, a message appears to prompt you to search for the address. To search for the address, click **Yes**. If the address can be validated, you return to the AddressAccelerator screen.
9. Click **Update Address**. The correct address information appears in the address fields in the Data Entry grid.

Freezing and Unfreezing Columns in the Data Entry Grid

You can use the **Freeze** and **Unfreeze** menu options to lock and unlock all columns to the left of the column you select. For example, you may want to freeze the **Constituent Name** column so you can always view the name of the constituent for which you are adding address information. When you freeze a column, it remains stationary and visible regardless of the horizontal direction you scroll. When you unfreeze a column, the columns move to the left or right corresponding to the horizontal direction you scroll. If the selected column is already frozen or unfrozen, the **Freeze** or **Unfreeze** options are disabled.

► Freezing a column in a batch

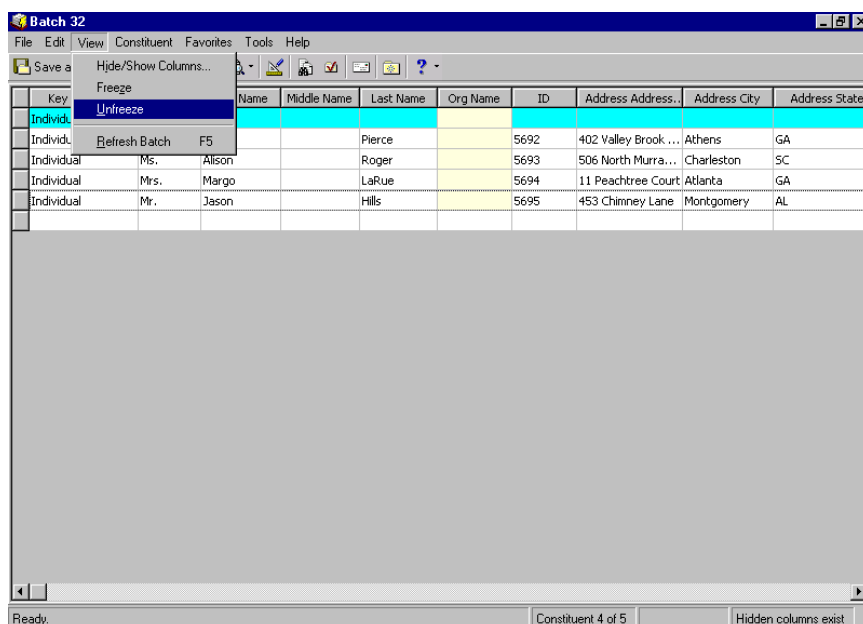
1. From the Data Entry screen for a batch, put your cursor in any row of the right-most column to freeze. For example, to freeze the first three columns in the batch, put your cursor in any row in the third column in the batch and select **View, Freeze** from the menu bar.



2. When you use the horizontal scroll bar, the selected column and all columns to the left of this column remain stationary.

► Unfreezing a column in a batch

1. From the Data Entry screen for a batch, put your cursor in any row of the left-most column to unfreeze. For example, if the first three columns in the batch are frozen and you want to unfreeze the second and third column, put your cursor in any row in the second column in the batch and select **View, Unfreeze** from the menu bar.



2. The selected column and all columns to the right of this column are unfrozen. You can move to the left or right of the columns corresponding to the direction you scroll.

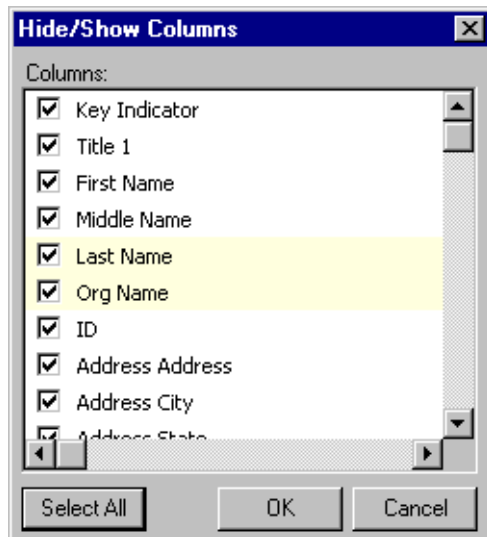
Hiding Columns and Viewing Hidden Columns in a Batch

If you select the same entry for a particular field for every constituent in a batch, you can enter a default and hide the field. For example, you add the names of new prospects to a batch. Because each prospect has a constituent code of Alumnus, you add Alumnus as the default for the **Constituent Code Code** field and hide the **Constituent Code Code** field. You cannot hide the **Last Name** field because your entry in this field is different for each constituent. You can use this procedure to determine the columns that are hidden or to display a hidden column.

► Hiding a column in a batch

Warning: If you have not entered a default for a field, you should not hide the field. Even though a hidden field is not visible on the Data Entry screen, it is still included in the batch and you need to enter data in the field.

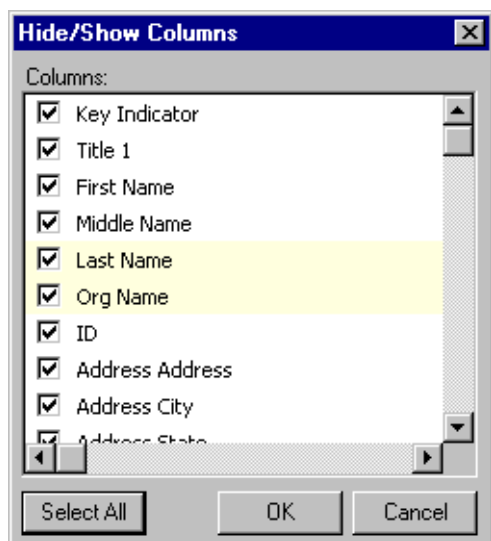
1. From the Data Entry screen for a batch, select **View, Hide/Show Columns** from the menu bar. The Hide/Show Columns screen appears.



2. Unmark the checkbox next to the columns to hide in the Data Entry grid.
3. Click **OK**. The columns you unmarked are now hidden in the batch.

► Viewing hidden columns in a batch

1. From the Data Entry screen for a batch, select **View, Hide/Show Columns** from the menu bar. The Hide/Show Columns screen appears.



Note: To display all the columns in the Data Entry grid, click **Select All**.

2. Mark the checkbox next to the columns you want to view in the Data Entry grid. For example, to view the **Phone type** column in the Data Entry grid, mark the **Phone type** checkbox.
3. To display the selected columns in the Data Entry grid, click **OK**.

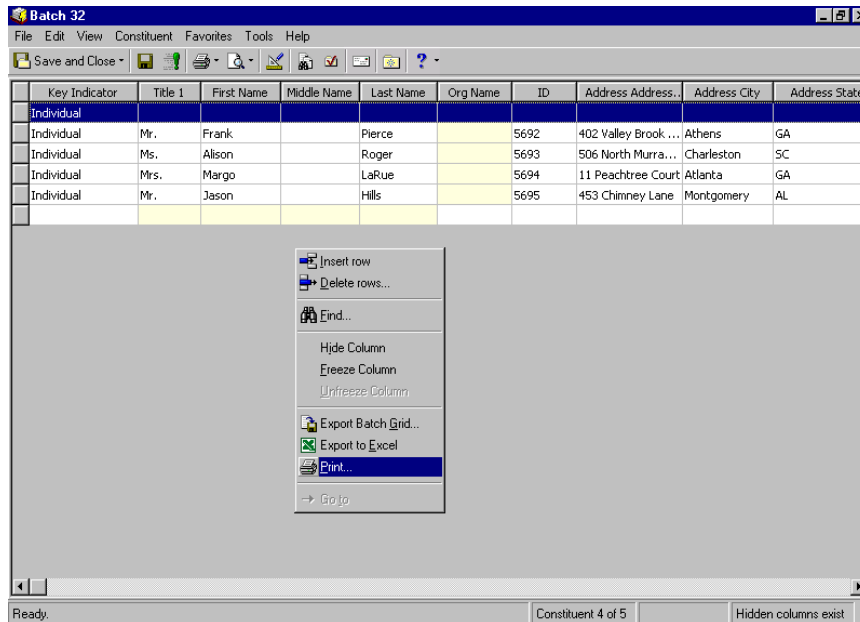
Printing Data from a Batch

You can use this procedure to print the current contents of the Data Entry grid.

► Printing the contents of the Data Entry grid

Note: To change your default printer, select **File, Print Setup** from the menu bar. For more information, see the *Program Basics Guide*.

1. From the Data Entry screen for a batch, right-click anywhere in the Data Entry grid. A shortcut menu appears. For more information about how to open a constituent batch, see “Accessing a Constituent Batch” on page 6.



2. Select **Print**. A Print Grid Options screen appears where you can specify settings for printing. The contents of the Data Entry grid then print to your default printer.

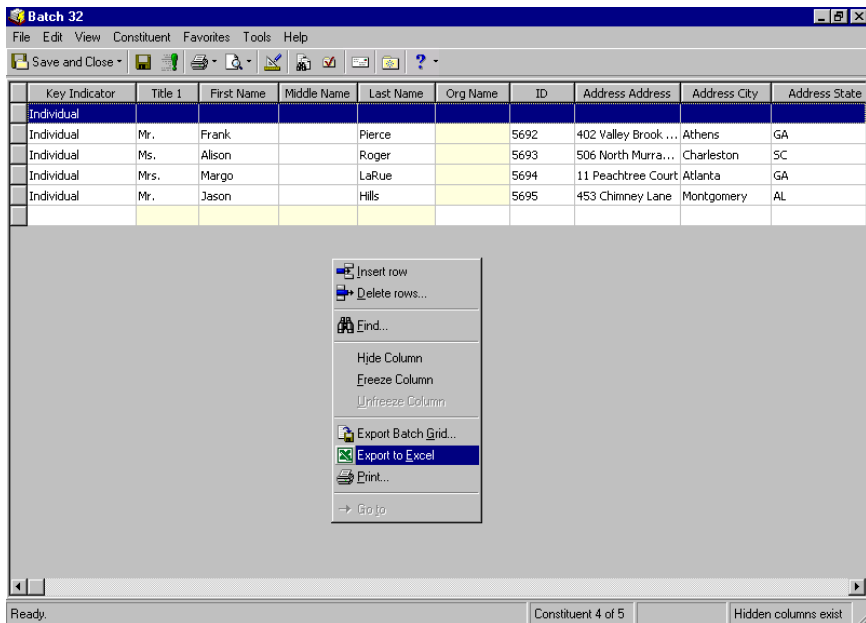
Exporting Data from a Batch

You can export the entire Data Entry grid to Microsoft *Excel* or to another application. When you select the Data Entry grid, all the data entered in the batch exports to your selected application. It is useful to export data from a batch to compare the data in the export to the data in the batch. For example, you may want to do a quick spot check of the data you entered in the batch.

► Exporting the Data Entry grid to Microsoft Excel

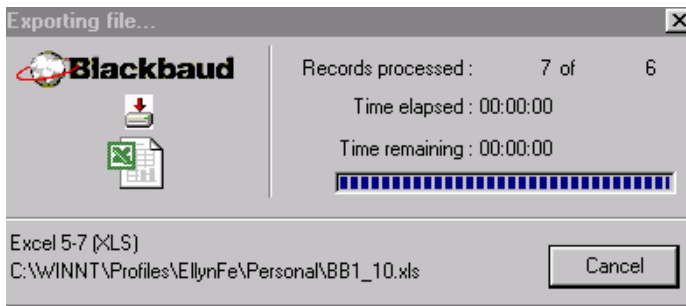
Note: You can use shortcut keys to move around *The Raiser's Edge* without the use of your mouse. For example, to export the Data Entry grid to Microsoft *Excel*, press **ALT + E, E** on your keyboard. To export the Data Entry grid to another application, press **ALT + E, G** on your keyboard.

1. From the Data Entry screen for a batch, right-click anywhere in the Data Entry grid. A shortcut menu appears.



Note: To stop the export and return to the Data Entry screen in *Batch*, click **Cancel** on the Exporting File screen.

2. Select **Export to Excel**. The Exporting File screen appears and displays a progress indicator. In the lower left corner of this Options screen, the path and file name of the export file appear.



Microsoft *Excel* automatically opens and displays the information exported from the Data Entry grid in *Batch*.

	A	B	C	D	E
1	Key Indicator	Name	Address as it will be printed	Constituent Code	Constituent Code Date From C
2	Individual				
3	Individual	Melanie Garrison	1624 Miles Lane Bossier City, LA 71110	Board Member	1/1/03
4	Individual	Deborah Miller	74 Tallassee Road Athens, GA 30606	Board Member	1/1/03
5	Individual	Thomas Calhoun	70 Milton Trails Athens, GA 30606	Board Member	1/1/03
6	Individual				
7					
8					
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					
20					
21					
22					
23					
24					
25					

3. To save any changes to the export file, select **File, Save** from the Microsoft *Excel* menu bar.

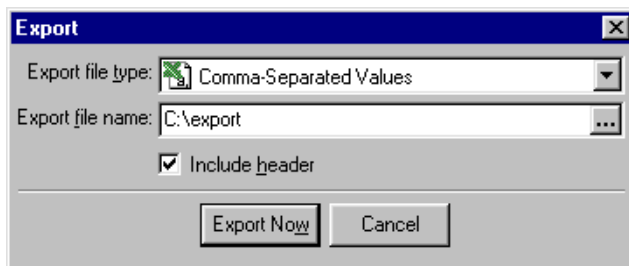
► Exporting the Data Entry grid to another application

1. From the Data Entry screen for a batch, right-click anywhere in the Data Entry grid. A shortcut menu appears.

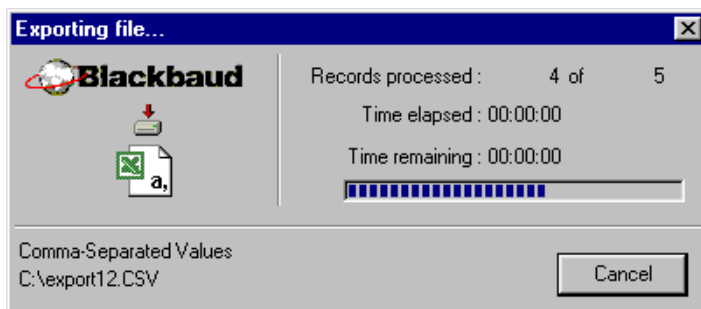
	Key Indicator	Title 1	First Name	Middle Name	Last Name	Org Name	ID	Address Address	Address City	Address State
Individual										
Individual	Mr.	Frank			Pierce		5692	402 Valley Brook ...	Athens	GA
Individual	Ms.	Alison			Roger		5693	506 North Murra...	Charleston	SC
Individual	Mrs.	Margo			LaRue		5694	11 Peachtree Court	Atlanta	GA
Individual	Mr.	Jason			Hills		5695	453 Chimney Lane	Montgomery	AL

Note: To stop the export and return to the Data Entry screen in *Batch*, click **Cancel** on the Export screen.

2. Select **Export Batch Grid**. The Export screen appears so you can choose the file type, location, and file name for the export file.



3. In the **Export file type** field, select the format for the export file. For more information about the available export formats, see the *Query & Export Guide*.
4. In the **Export file name** field, enter the name and location where you want to store the export file. To browse for the location to store the file, click the browse button.
5. To have the first row of the export file contain the column headings listed on the Data Entry screen, mark **Include header**.
6. To begin to export the Data Entry grid, click **Export Now**. The Exporting File screen appears and displays a progress indicator. In the lower left corner of this screen, the path and file name of the export file appear.



7. When the Exporting File screen closes, the export is complete. You can open the export file using an application compatible with the **Export file type** you selected.

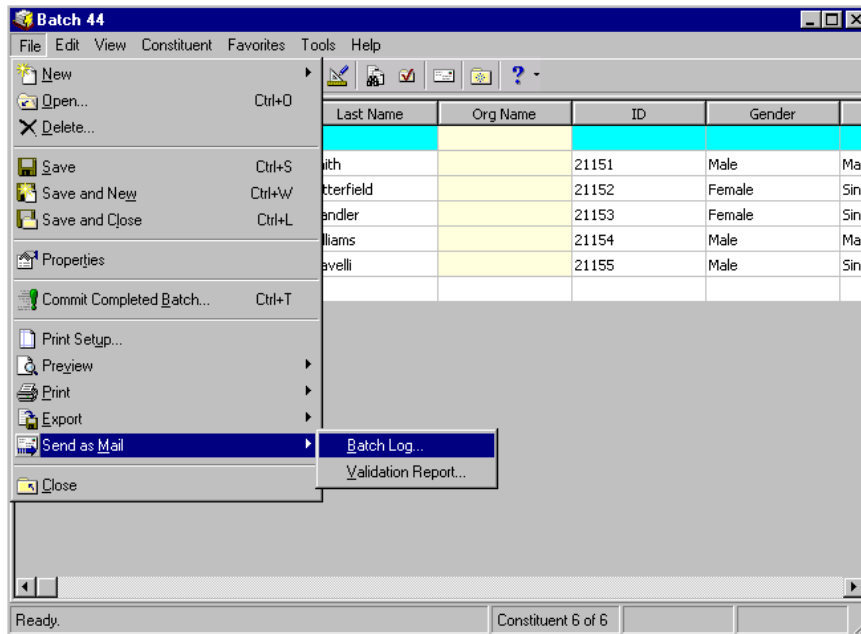
Sending a Constituent Batch Report as Email

Note: *The Raiser's Edge* is compliant only with MAPI email software such as Microsoft *Outlook*.

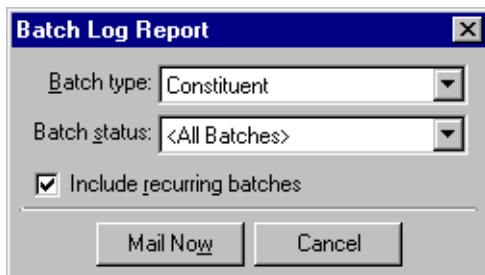
You can send information included in a batch report as email. For example, your Development Director is on a business trip and requests a batch log report for constituent batches you commit to the database this week. You can send all constituent batch reports as an email. When you send data as email, you can select the type of format for the information sent, select the recipients of the email, and check the names and addresses of the recipients. As a reminder, sending batch report information as email and working with options in *Mail* are separate. For more information about *Mail*, see the *Mail Guide*.

► **Sending a constituent batch report as email**

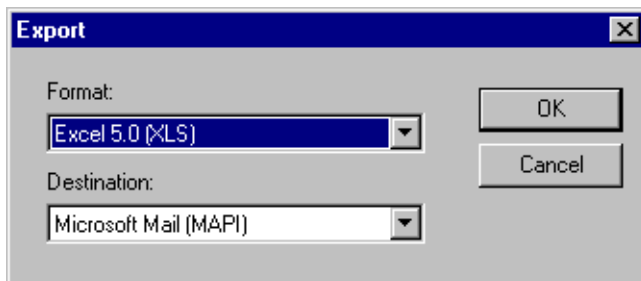
1. From the Data Entry grid, select **File, Send as Mail** from the menu bar. Select the type of report to send. For more information about how to open a constituent batch, see “Accessing a Constituent Batch” on page 6.



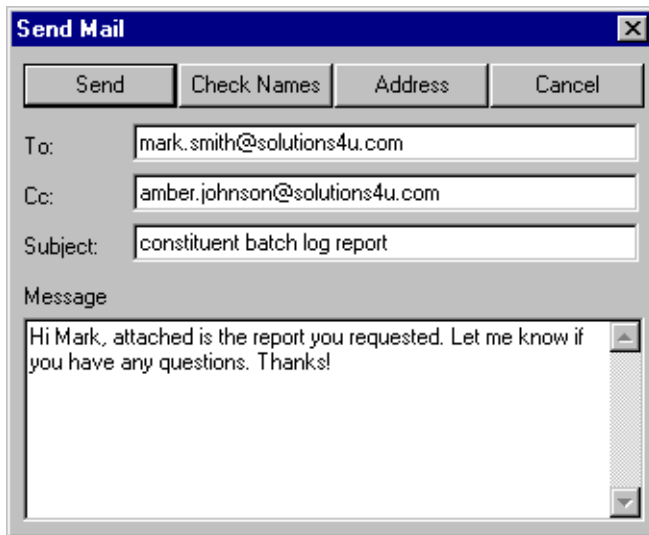
The Batch Log Report screen appears.



2. In the **Batch type** field, select the type of batch to include in the report. You can include constituent, gift, time sheet, or all batches.
3. In the **Batch status** field, select the status of batches to include in the report. You can include open, closed, or all batches.
4. To include recurring batches in the report, mark **Include recurring batches**.
5. Click **Mail Now**. The Export screen appears.



6. In the **Format** field, select the type of format in which to export the report. Some examples of format are Crystal Reports (RPT), Text, or Rich Text Format.
7. In the **Destination** field, select “Microsoft Mail (MAPI)”.
MAPI, an acronym for Messaging Application Program Interface, is the application used to send mail from a queue. This program interface enables you to send email from within a *Windows* application, such as Microsoft *Word*, and include the open document as an attachment.
8. Click **OK**. The Send Mail screen appears.

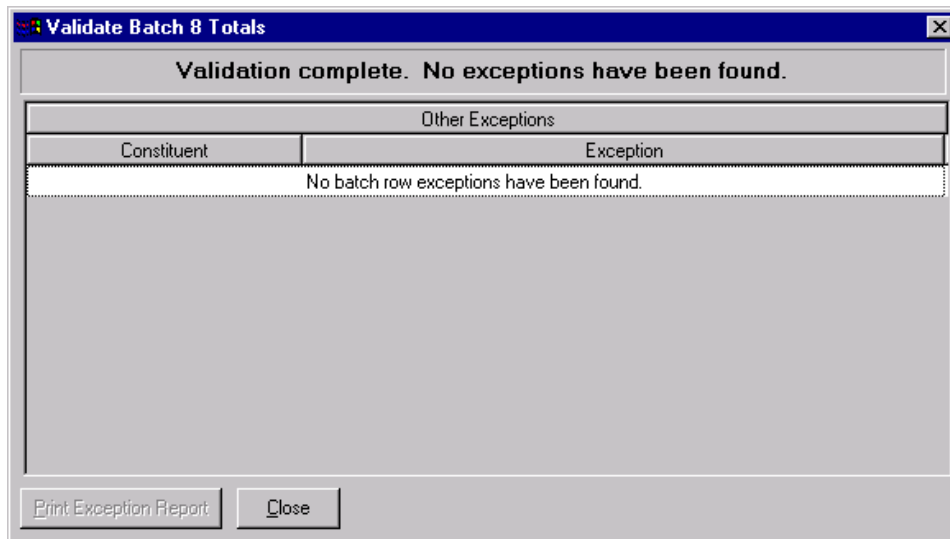


9. Enter the information on the Send Mail screen as shown in the previous picture. The report information you send is automatically attached to the email in the format you specify. You do not see the information in the body of the email, but once you send the email, the information from the report is sent.
10. On the Send Mail screen, click **Send**.

Validating a Batch

When you validate a batch, the program examines all constituents entered in the batch to determine whether any data entry errors exist. For example, you may have added two constituents with the same constituent ID. Because all constituent IDs must be unique, *The Raiser's Edge* does not add the two constituents with identical constituent IDs to the database when you commit the batch. When you validate, you are prompted to search for duplicate constituents in the database. You can specify that *The Raiser's Edge* search for duplicate entries in the database based on the duplicate search criteria you specified in *Configuration*. For more information about how to set up duplicate search criteria, see the *Configuration & Security Guide*. We strongly recommend you validate a batch before or while you commit it to the database so you can locate all the data entry errors.

When *The Raiser's Edge* finishes the batch validation, the Validate Batch screen appears and displays the results of the validation process. For any problem found in the batch, exceptions are created and appear either on the Validate Batch screen or when you commit the batch to the database. Other examples of exceptions include duplicate social security numbers and spouses who are linked to existing constituents.

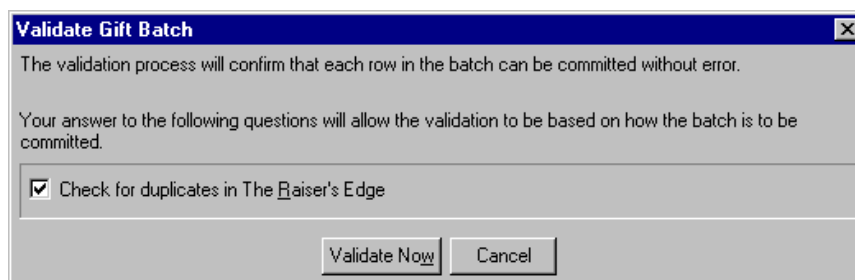


If any exceptions are found, you can correct the problem so the batch can be committed to the database without difficulty. If the program finds more than one exception on a single row, it displays only the first exception in the grid. After you resolve all the exceptions, we recommend you validate the batch a second time to verify a single row did not have multiple exceptions. You can also validate a batch while you commit the batch to the database. When you select to commit a batch to the database, *The Raiser's Edge* runs a second validation if you mark **Validate batch before committing** on the screen. You can preview or print the exception report for the constituents that could not be committed. For more information about how to commit constituents to the database, see "Committing a Batch" on page 62.

► Validating a constituent batch

Note: You can use shortcut keys to move around *The Raiser's Edge* without the use of your mouse. For example, to validate a constituent batch, press **ALT + T, V** on your keyboard.

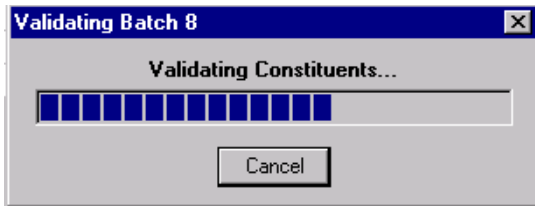
1. From the Data Entry screen of a constituent batch, select **Tools, Validate** from the menu bar to begin the validation process. The Validate Constituent Batch screen appears. For more information about how to open a constituent batch, see "Accessing a Constituent Batch" on page 6.



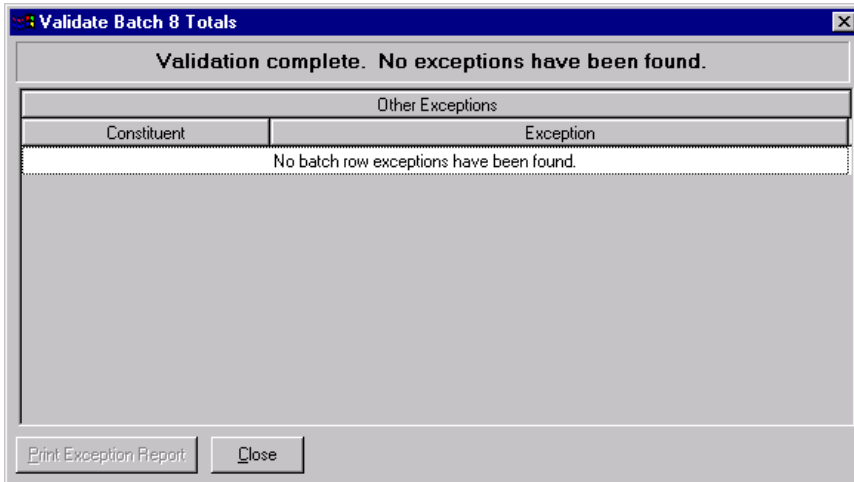
2. To check the constituent batch for duplicate records against *The Raiser's Edge* database, mark **Check for duplicates in The Raiser's Edge**. When you mark this checkbox, you search for records entered in the batch that duplicate any records already in your database.

Note: To stop the validation and return to the Data Entry screen in *Batch*, click **Cancel**.

3. Click **Validate Now**. A status bar appears and displays the progress of the validation.



4. When the program completes the validation, the Validate Batch screen appears.



Warning: If the program finds more than one exception on a single row, it displays only the first exception in the grid. After you resolve all exceptions, we recommend you validate the batch a second time to verify a single row did not have multiple exceptions.

At the top of the screen, the program displays a message that informs you of the status of the validation. If *The Raiser's Edge* did not find any exceptions in the batch, the message "Validation complete. No exceptions have been found." appears. When the program finds one or more exceptions in the batch, the message "Validation complete. Exceptions have been found." appears. When the program finds exceptions, it displays the exceptions in the Exceptions grid. If any rows in the constituent batch are duplicates of records already in the database, an exception is created.

5. To print an exception report, click **Print Exception Report**. A report prints and lists the Constituent name, Constituent ID, and the reason for the exception. When exceptions are found in the batch, we recommend you print an exception report.

When you commit the batch to the database, you can mark **Validate batch before committing** to run a second validation process. In some cases, exceptions are found during this process if they were not found during the initial validation process. For more information about how to commit constituent batches to the database, see "Committing a Batch" on page 62.

6. To return to the Data Entry screen, click **Close**.

Committing a Batch

When you finish entering constituents in the batch, you can commit the batch to add the new constituents to your database.

► Committing a constituent batch

Note: You can use shortcut keys to move around *The Raiser's Edge* without the use of your mouse. For example, to commit a constituent batch, press **CTRL + T** on your keyboard.

1. From the Data Entry screen of a constituent batch, select **File, Commit Completed Batch** from the menu bar. The Commit Constituent Batch screen appears so you can specify options *The Raiser's Edge* uses when it commits the batch. For more information about how to open a constituent batch, see "Accessing a Constituent Batch" on page 6.

Batch Statistics	
Number of constituents:	4
Date last committed:	
Created on:	01/10/2005 7:58:52 AM
Created by:	Supervisor
Last changed on:	01/10/2005 7:59:18 AM

Note: The **Batch Statistics** grid displays information about the constituents entered in the batch.

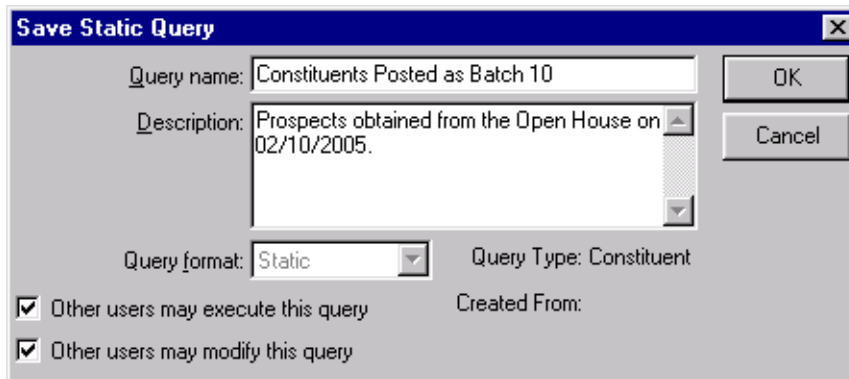
2. To validate the batch before you commit it to the database, mark **Validate batch before committing**. If you have not validated the batch, we strongly recommend you mark this checkbox. Batch validation can locate problems you may encounter when you commit the batch.

Even if you already validated the batch, you should mark **Validate batch before committing** to run a second validation to find exceptions that may not have been detected during the first validation process.

Warning: When you mark **Create constituent query of committed constituents**, *The Raiser's Edge* includes only the constituents committed to the database. Any constituents not committed to the database due to exceptions are not included in the query.

3. To create a query of constituents successfully committed to the database, mark **Create constituent query of committed constituents**. If you mark this checkbox, the Save Static Query screen appears before *The Raiser's Edge* commits the batch to the database. We strongly recommend you mark this checkbox because you can use this query to send a letter or other mailing to the new constituents you add to the database.
4. To print or preview a control report after you commit the batch to the database, mark **Create control report**. When you mark this checkbox, select whether to create a Detail or Summary report in the adjacent field. Also, select whether to print or preview the control report. For more information about this report, see "Commit Control Report" on page 69.
5. To delete the batch file after you commit the batch to the database, mark **Delete batch after committing**. Even though the program deletes the batch file, the batch number is not reused. You may want to mark this checkbox to reduce the size of your database.
6. To check the constituent batch for any duplicate records that may exist in *The Raiser's Edge*, mark **Check for duplicates in The Raiser's Edge**. When you mark this checkbox, you search for records entered in the constituent batch that duplicate any records already in your database.

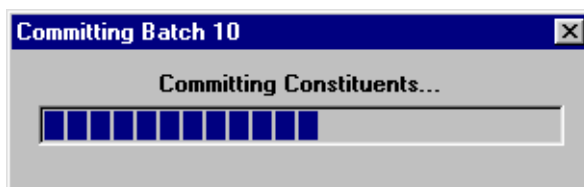
7. To begin to commit the batch to the database, click **Commit Now**.
8. If you mark **Create constituent query of committed constituents** on the Commit Constituent Batch screen, the Save Static Query screen appears.



The "Save Static Query" dialog box contains the following fields and options:

- Query name:** Constituents Posted as Batch 10
- Description:** Prospects obtained from the Open House on 02/10/2005.
- Query format:** Static
- Query Type:** Constituent
- ☒ Other users may execute this query
- ☒ Other users may modify this query
- Created From:** (empty field)
- Buttons:** OK, Cancel

9. In the **Query name** field, the program defaults "Constituents Posted as Batch []". You can use this name or enter a new name for the query.
10. In the **Description** field, enter a description that explains the contents of the query. For example, enter "Prospects obtained from the Open House on 02/10/2005."
11. To enable others to use this query, mark **Other users may execute this query**.
12. To enable other users to modify this query, mark **Other users may modify this query**.
13. Click **OK**. A progress indicator appears.



The "Committing Batch 10" dialog box shows a progress bar with the text "Committing Constituents..." above it. The progress bar is partially filled with blue segments.

Note: To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), *The Raiser's Edge* does not store credit card numbers in the database. When you commit a batch that contains credit card numbers, the program commits the token identifiers generated by the Blackbaud *Payment Service* for the numbers to the database. In the records created or updated by the batch, only the last four digits of the credit card number appear.

14. When *The Raiser's Edge* finishes committing the batch, the Commit Batch screen appears.



The "Commit Batch 36" dialog box displays the "Commit Complete" status. It includes a checkered flag icon on the left and a table of results on the right.

Commit Complete	
Batch:	36
Constituents in Batch:	31
Constituents Committed:	31
Exceptions:	0

Buttons: Close, Exception Report

This screen displays the batch number assigned to the constituent batch you commit, the number of constituents in the batch file, the number of constituents *The Raiser's Edge* could commit to the database, and the number of constituents *The Raiser's Edge* could not commit to the database.

Note: If the program creates exceptions when you commit the batch, we recommend you view or print the exception report so you can correct the discrepancies and commit the batch again.

15. If there are exceptions, click **Exception Report** to view an exception report. The exception report provides more detail about the constituents *The Raiser's Edge* could not commit to the database. The exception report displays the constituent name, ID, and the reason for the exception for each constituent *The Raiser's Edge* could not commit to the database.
16. To close the Commit Batch screen, click **Close**.
17. After you commit a constituent batch, constituents successfully committed to the database are removed from the batch. Any constituents with exceptions remain in the batch file so you can fix the discrepancy causing the exception and recommit the batch. When you recommit a constituent batch, the same batch number is used.

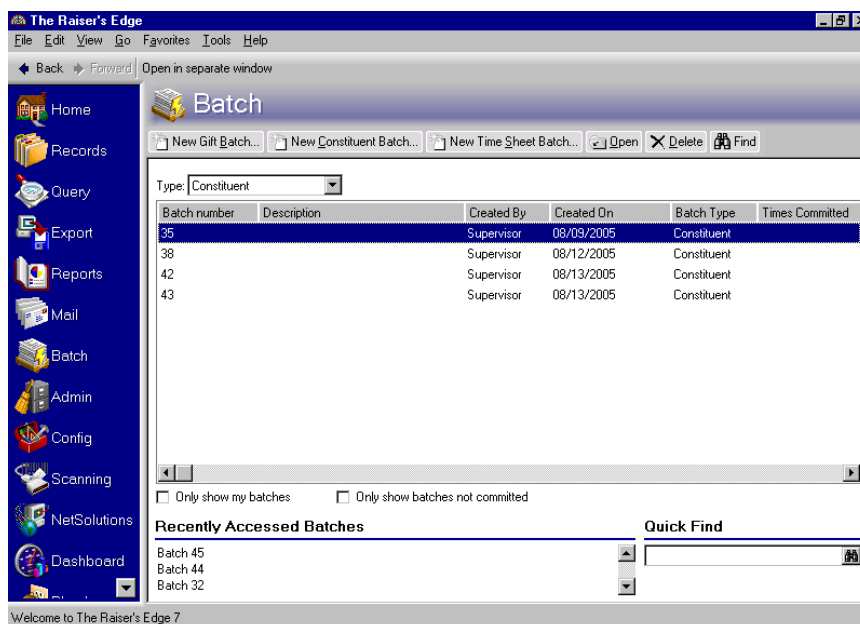
Deleting an Existing Batch

On occasion, you may want to delete a batch from your database. For example, after you commit a batch to your database, you may want to delete the batch so you can reduce the size of your database. You can delete a batch from the Batch page or the Data Entry screen. This section explains both methods to delete a batch from your database.

► Deleting an existing constituent batch from the Batch page

Note: To delete multiple batches at a time, select **Tools, Delete Multiple Batches** from the menu bar of the Batch page. To access this option, you can also right-click on the Batch page. Once a batch is deleted, the batch number cannot be used again.

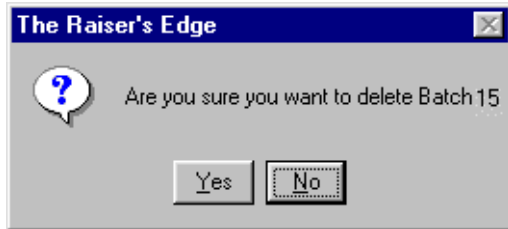
1. On the Raiser's Edge bar, click **Batch**. The Batch page appears.



2. In the grid, select the batch to delete.

- On the action bar at the top of the screen, click **Delete**. If you do not have security rights to delete a batch, **Other users may access this batch** is not marked, or you did not create the batch, the message “User not authorized to delete this batch.” appears.

If you do have security rights to delete a batch, a message appears.

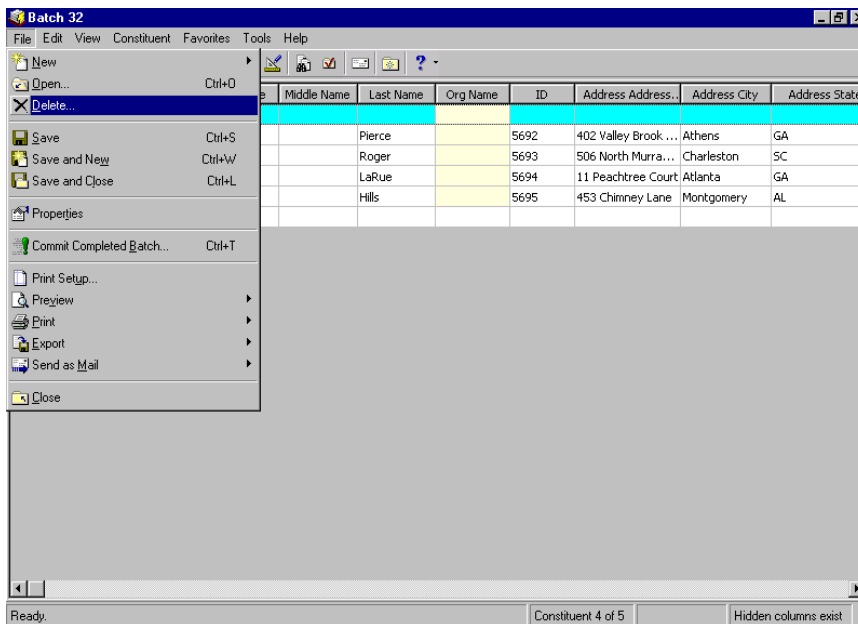


Warning: You cannot reuse a batch number even if you delete the batch associated with the batch number.

- To delete the batch, click **Yes**. To return to the Batch page and not delete the batch, click **No**.

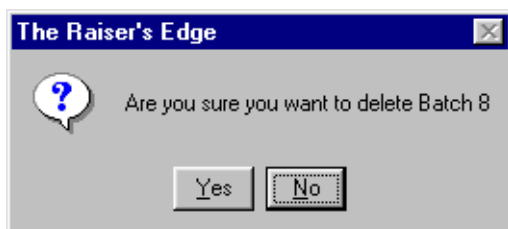
▶ Deleting an existing constituent batch from the Data Entry screen

- From the Data Entry screen of a constituent batch, select **File, Delete** from the menu bar. For more information about how to open a constituent batch, see “Accessing a Constituent Batch” on page 6.



Note: To delete rows in a batch, you can also select the row to delete and right-click. From the right-click menu, select **Delete rows**.

A message appears.



- To delete the batch, click **Yes**. To return to the Data Entry screen and not delete the batch, click **No**.

Batch Reports

Several constituent batch reports are available to help you track the constituents entered in a batch, record the settings selected when you commit a batch, and correct the exceptions generated when you commit a batch. This section explains the available reports and displays a sample of each report. If you use the optional module *Electronic Funds Transfer*, additional reports are available in *Batch*. For more information about EFT reports, see the *Electronic Funds Transfer (EFT) Guide*.

Validation Report

You can print a Validation report to keep a record of all constituents entered in a batch. This report is useful to make sure all constituent data was correctly entered in the batch. To print the Validation report, select **File, Print, Validation Report** from the menu bar.

New Batch Validation Report

1 of 1+ 100% Total: 5 100% 5 of 5

Preview

09/06/2004

Blackbaud Demo
Batch Validation Report - Batch 32

Key Indicator	Title 1	First Name	Middle Name	Last Name
Address Address	Address City	Address State	Address ZIP	Address Country
Constituent Code Code	Constituent Code Date F	Constituent Code Date T		
Individual	Mr.	Frank		Pierce
402 Valley Brook Drive	Athens	GA	30606	United States
	09/06/2003	09/06/2004		
Individual	Ms.	Alison		Roger
506 North Murray Drive	Charleston	SC	29406	United States
	09/06/2003	09/06/2004		
Individual	Mrs.	Margo		LaRue
11 Peachtree Court	Atlanta	GA	30335	United States
	09/06/2003	09/06/2004		
Individual	Mr.	Jason		Hills
453 Chimney Lane	Montgomery	AL	36110	United States
	09/06/2003	09/06/2004		

Batch Entry Log Report

To preview the Batch Entry Log Report, select **File, Preview, Batch Log** from the menu bar of a constituent batch. You can select to preview constituent, gift, time sheet or all batches in the database. You can also select to preview open, closed, or all batches in the database.

Batch Log Report

Batch type: <All Batches>

Batch status: <All Batches>

☐ Include recurring batches

Preview Now Cancel

The Batch Entry Log Report lists information for all or selected batches in your database. For example, the Batch Entry Log Report can contain the batch number, the running number of constituents in a batch, and the status of a batch. We recommend you preview the Batch Entry Log Report before you print it. To print the report, select **File, Print, Batch Log** from the menu bar of a gift batch. From the Batch Entry Log Report preview, you can select to print the Report or export the Report to another application.

09/06/2004

**Blackbaud Demo
Batch Entry Log Report**

Gift Batches

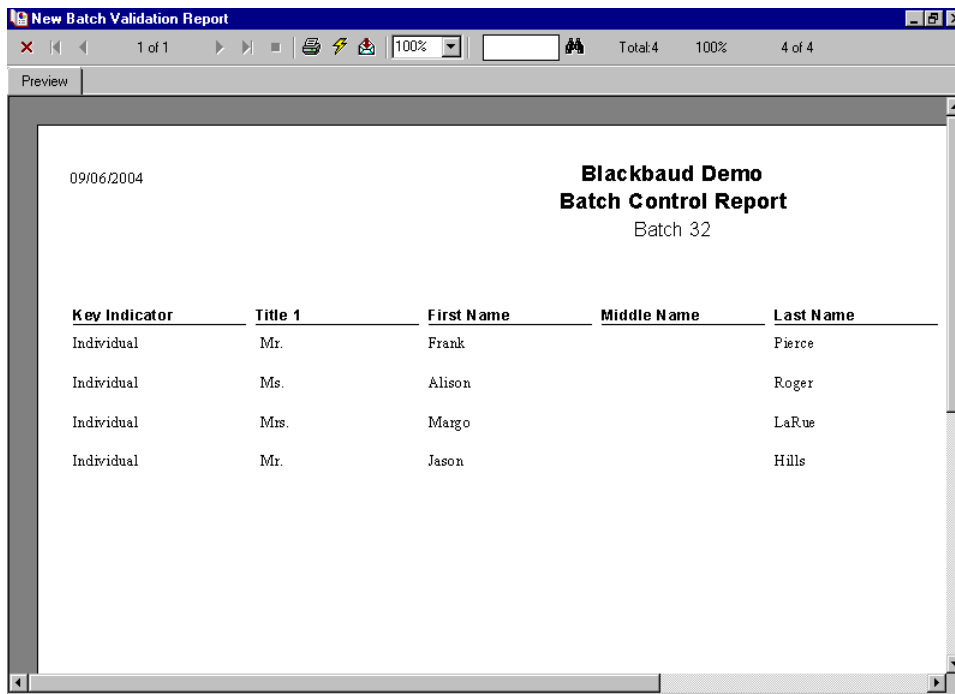
Batch Number	Description	CreatedBy	Projected Amount	Projected No. Gifts	Running Amount	Running No. Gifts	Status
21		Supervisor			\$9,990.00	25	Closed
28	All recurring gifts due as of 11/1/2003	Supervisor	\$1,000.00	10	\$1,000.00	10	Open
33	10 gifts of \$100 - 10/03/2003	Supervisor			\$0.00	1	Open
Total Gift Batches listed:			3				

Constituent Batches

Batch Number	Description	Created By	Number of Constituents	Status
32	Prospects obtained from the Open House on 09/06/2003.	Supervisor	5	Open
35		Supervisor		Open
36		Supervisor		Closed

Commit Control Report

When you mark **Create control report** on the Commit Constituent Batch screen, a control report previews or prints after you commit a batch to the database. The report includes the constituent name, date, and all other constituent batch fields entered in the batch. To access the Commit Constituent Batch screen, select **File, Commit Completed Batch** from the menu bar of a constituent batch. For more information about this screen, see “Committing a Batch” on page 62.



The screenshot shows a software window titled "New Batch Validation Report". The window has a standard toolbar with icons for back, forward, print, and zoom. The status bar at the bottom indicates "Total: 4", "100%", and "4 of 4". The main content area is labeled "Preview" and displays the following information:

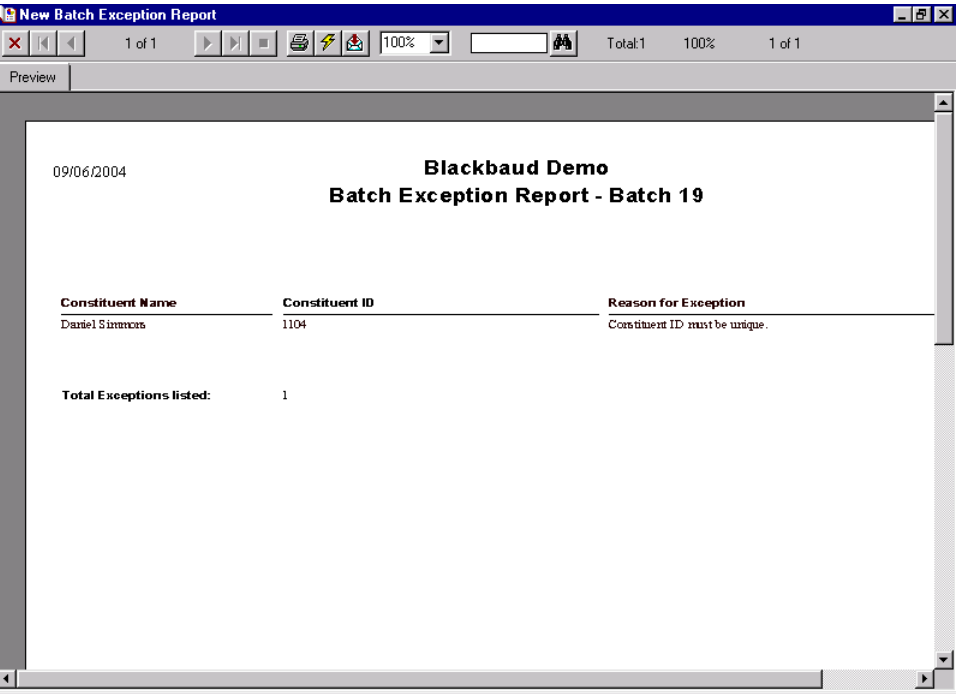
09/06/2004

Blackbaud Demo
Batch Control Report
Batch 32

Key Indicator	Title 1	First Name	Middle Name	Last Name
Individual	Mr.	Frank		Pierce
Individual	Ms.	Alison		Roger
Individual	Mrs.	Margo		LaRue
Individual	Mr.	Jason		Hills

Commit Exception Report

After the program commits a constituent batch to the database, the Commit Constituent Batch screen appears and displays the results of the committing process. If exceptions are generated when the batch is committed to the database, click **Exception Report** on the Commit Batch screen to display the exception report.



For each exception, this report displays the constituent name, constituent ID, and reason for the exception. Examples of exceptions for a constituent batch include duplicate constituent names and duplicate constituent identification numbers. The total number of exceptions appear at the bottom of the exception report.

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To add a gift to the database, you can use the Records page to create a new gift record that contains the appropriate information. When you add many gift records to the database at once, this process may take a long time depending on the number of gifts you add. *Batch* is an alternate method to add constituents, gifts, and time sheets to your database. With *Batch*, you can enter and update information on constituent and gift records quickly because you do not need to open each individual constituent or gift record to add or update information. Instead, you select the fields to add or update and the program lists these fields in a spreadsheet, called a batch, so you can efficiently enter information in the database.

There are three types of batches: constituent, gift, and time sheet. In a constituent batch, you add new constituent records to the database. You can use a gift batch to add new gifts, pledge payments, or recurring gifts to your database. To update or add information on the donor's constituent record, you can use the **Constituent Window** option in a gift or time sheet batch to access and modify information on a donor's constituent record.

Note: To move around *The Raiser's Edge* without the use of your mouse, you can use shortcut keys. Several examples of shortcut keys are listed throughout this guide. In addition, all shortcut keys available for *Records* fields are also available for *Batch* fields. For example, on a constituent record, you can press **F3** on your keyboard to add a constituent's first name to the **Nickname** field. This same shortcut key exists for the **Nickname** field in a batch.

To create records for the constituents, gifts, or time sheets entered in a batch, you need to commit the batch to the database. When you commit a batch, the program checks for duplicate constituents, gifts, and time sheets. If the program finds a problem with an entry in the batch, it creates an exception and does not add the constituent, gift, or time sheet record to the database. If exceptions are found, you can edit the entry and recommit the information to the database.

Before you begin to use *Batch* to add constituents, gifts, or time sheets to your database, you must understand and practice entering constituents, gifts, and time sheets from the Records page of *The Raiser's Edge*. Many options available on constituent, gift, or time sheet records are also available in *Batch* and work in a similar manner. For example, similar functionality includes adding gifts for tributes and memberships. To learn more about how to create and add gift records from the Records page, see the *Gift Records Guide*. This chapter focuses on gift batches. For more details about constituent batches, see "Constituent Batch" on page 1.

Batch Setup Information

Before you begin to work with gifts in *Batch*, it is important to understand some basic setup information that will help process gifts in a batch. This section outlines the information you need to be aware of before you process gifts in a batch. This section also offers a basic overview and directs you to more detailed sections and procedures in this chapter to help you get started. Setup information includes user options and business rules, as well as batch templates and an overview of how *Batch* works with the optional module *Electronic Funds Transfer*.

User Options

User options are preferences you set that affect how *The Raiser's Edge* looks and runs on the workstation you use. User options are login-specific, which means that if you log into any workstation with your password, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. Before you begin to work with gifts in a batch, it is important to set up user options. Several user options are specific to *Batch*. For example, you can automatically save an open batch at specified time intervals, select the format for constituent names in batch reports, and specify how you want to add default entries to a batch. For gift batches, you can set user options to:

- Automatically save a batch upon closing out of the batch.
- Automatically save a batch during regular intervals, such as every five minutes.
- Specify how constituent names appear when you work with them in a gift batch.
- Automatically ask you to save the batch before you save information in a Constituent Window.

- Automatically display the Pledge Installment Schedule screen when you select Pledge in the **Gift type** field and tab to the next row in a gift batch.
- Automatically add the **gift barcode scanning** field when you create a new gift batch.
- Automatically advance to the next row if you want *The Raiser's Edge* to begin a new row in the Data Entry grid immediately after you scan the gift barcode.
- Specify formats for your Validation report.
- Display the default row in the first row of the Data Entry grid.
- Specify whether to enter defaults in your batch when you press **F2** within a field, select a field, or begin a new row in the batch.
- Specify EFT options.
- Specify individual and organization report formats.
- Specify a color for the default row of a gift batch row.

For detailed information about how to set up these user options, see “User Options” on page 83.

Business Rules

You can set up business rules to control certain functions and displays in *The Raiser's Edge*. Unlike user options, business rules affect all users of the program. Several business rules affect the way you use *Batch*. For example, each gift batch has a unique batch number associated with it. In business rules, you can select a meaningful format for the batch number. Also, many business rules for gift records also apply to gifts entered in *Batch*. You can select to receive warnings when you add a gift for a constituent who has an outstanding pledge balance, outstanding registration fees, or a lapsed membership. For gift batches, you can set business rules to:

- Specify batch numbers and select the format in which they appear.
- Select to receive warnings when you add gifts in a batch for constituents who have outstanding pledge balances.
- Select to receive warnings when you add gifts in a batch for constituents who have outstanding recurring gifts.
- Select to receive warnings when you add gifts in a batch for constituents who have outstanding event registration fees.
- Select to receive warnings when you add gifts in a batch for constituents who have lapsed memberships.
- Select either IATS/Other or ICVerify as your credit card authorization service and set up account information. With the optional module *Electronic Funds Transfer*, you can create transmission files in *Batch* to send to an authorization service, such as *Blackbaud Merchant Services* or IATS. For information about transmission files and *Electronic Funds Transfer*, see the *Electronic Funds Transfer (EFT) Guide*.

For detailed information about how to set up these business rules, see “Business Rules” on page 89.

Batch Templates

When you work with batches, you can easily create a new batch based on an existing batch and therefore create a “template” so to speak. To create a batch template, you simply search for an existing batch in your database and copy the batch field list from that batch into your new batch. When you copy a field list to a new batch, you essentially use the existing batch as a template. In your new batch, you can also add additional fields and remove unnecessary fields as needed.

To copy a field list from another batch, click **Load from Existing Batch** on the Fields tab of the Gift Batch Setup screen. This feature saves you time because you do not need to re-create a field list you already used in another batch. When you load fields from another batch, the program replaces any fields in the **Data entry fields** box with the fields selected in the existing batch. When you click this button, the Open screen for batches appears so you can search for the existing batch from which to copy fields. After you select the **Data entry fields** for a batch and save the batch, you can copy the field list to use as a template when you create a new batch. For more information about how to create batch templates, see “Creating a Batch Template by Loading Fields from an Existing Batch” on page 108.

Batch and EFT

If you use the optional module *Electronic Funds Transfer*, additional features are available in *Batch* so you can use **The Raiser’s Edge** to easily process your gifts. Normally, each time a constituent sends a transaction for a recurring gift or makes a payment for a pledge, you need to create a new gift record for the transaction or payment. If you use the optional module *Electronic Funds Transfer*, you can select the **Automatically Generate Transactions/Payments** menu option in *Batch* to select the recurring gifts or pledges that require transactions or payments. Then, **The Raiser’s Edge** automatically generates an entry for each eligible recurring gift transaction or pledge payment in the gift batch you use.

Once you automatically generate transactions and payments in your batch, you can process your credit card or direct debit transactions. To process your transactions, create a transmission file to send to the financial institution sponsoring the direct debit transactions, or to *ICVerify* or an authorization service such as *Blackbaud Merchant Services* or International Automated Ticket Systems (IATS), by way of the *Blackbaud Payment Service*, for credit card authorization.

A transmission file is an electronic file that contains information about the gifts to process by electronic funds transfer. This information includes account numbers, encrypted credit card numbers or token identifiers, and other processing information necessary to perform the transaction. To create these files, you can use the **Create EFT Transmission Files** menu option in *Batch*. For more information about the optional module *Electronic Funds Transfer* and how you can use it to process gifts in *Batch*, see the *Electronic Funds Transfer (EFT) Guide*.

Frequently Used Terms

This section defines words and phrases you need to know as you work with batch information. If you come across an unfamiliar term when you read this or any chapter in **The Raiser’s Edge** documentation, check the online glossary in the help file.

Batch. Batch is a method of data entry you can use to quickly create many new constituent or gift records. There are three types of batches — constituent, gift, and time sheet. A batch resembles a spreadsheet, and each row of the spreadsheet contains information for a single constituent, gift, or time sheet record.

Blackbaud Merchant Services. You can use *Blackbaud Merchant Services* to automatically authorize and process credit cards in *Batch* through the *Blackbaud Payment Service*. To process credit card transactions in **The Raiser’s Edge**, you can use *Blackbaud Merchant Services* as your credit card processing agency.

Blackbaud Payment Service. To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), **The Raiser’s Edge** uses the *Blackbaud Payment Service* to securely store credit card information. When you enter or edit credit card information in a batch, the program automatically sends the data to the *Blackbaud Payment Service* when you leave the row in the data entry grid. When you commit a batch that contains credit card information, **The Raiser’s Edge** commits the token identifier used to identify the credit card number in the *Blackbaud Payment Service* to the database. You also use the *Blackbaud Payment Service* to securely process credit card transactions through your authorization service merchant account.

Default row. When displayed, the Default Row is the first row in the Data Entry grid and contains the default values you selected on the Defaults tab of the Gift Batch Setup screen. When you add gifts to the batch, any information entered in the Default Row appears as a default for each new gift in the batch. In User Options, you can display or hide the Default Row, choose a color in which to display this row, and select how to add the defaults for each gift.

EFT. EFT stands for Electronic Funds Transfer and is a general banking system by which transactions, such as deposits or bill payments, are made electronically from a donor's bank account or credit card to your bank account.

Electronic payment type. On a gift record, if you choose an electronic payment type, a constituent's money can be transferred to your organization without the use of paper or hard currency. A payment type is electronic when you select credit card or direct debit in the **Pay method** field and use the optional module *Electronic Funds Transfer* to receive the funds. If you do not use *Electronic Funds Transfer* to receive the funds, the payment type is considered non-electronic. For more information about the optional module *Electronic Funds Transfer*, see the *Electronic Funds Transfer (EFT) Guide*.

IATS. IATS stands for International Automated Ticket Systems. You can use IATS, to automatically authorize and process direct debit and credit card transactions in *Batch*. To process credit card transactions in *The Raiser's Edge*, you can use IATS as your credit card processor through the *Blackbaud Payment Service*.

ICVerify. ICVerify is a third-party software you can purchase to automatically process credit card transmission files from *Batch*. To process credit card transactions in *The Raiser's Edge*, you need to use ICVerify as your credit card processing agency. *The Raiser's Edge* interfaces with ICVerify and automatically processes your credit card transactions when you create a transmission file. For more information, see the *Electronic Funds Transfer (EFT) Guide* or your ICVerify user's guide.

Note: To transfer funds electronically using the optional module *Electronic Funds Transfer*, mark **EFT?** on the Gift tab of a gift record.

Non-electronic payment type. On a gift record, if you choose a non-electronic payment type, a constituent's money must be transferred to your organization by way of paper, such as a personal or business check or hard currency. The non-electronic payment types available in *The Raiser's Edge* are cash, personal check, business check, and other. When you do not use the optional module *Electronic Funds Transfer* to receive the funds, credit card and direct debit payment types are also considered non-electronic. For more information about the optional module *Electronic Funds Transfer*, see the *Electronic Funds Transfer (EFT) Guide*.

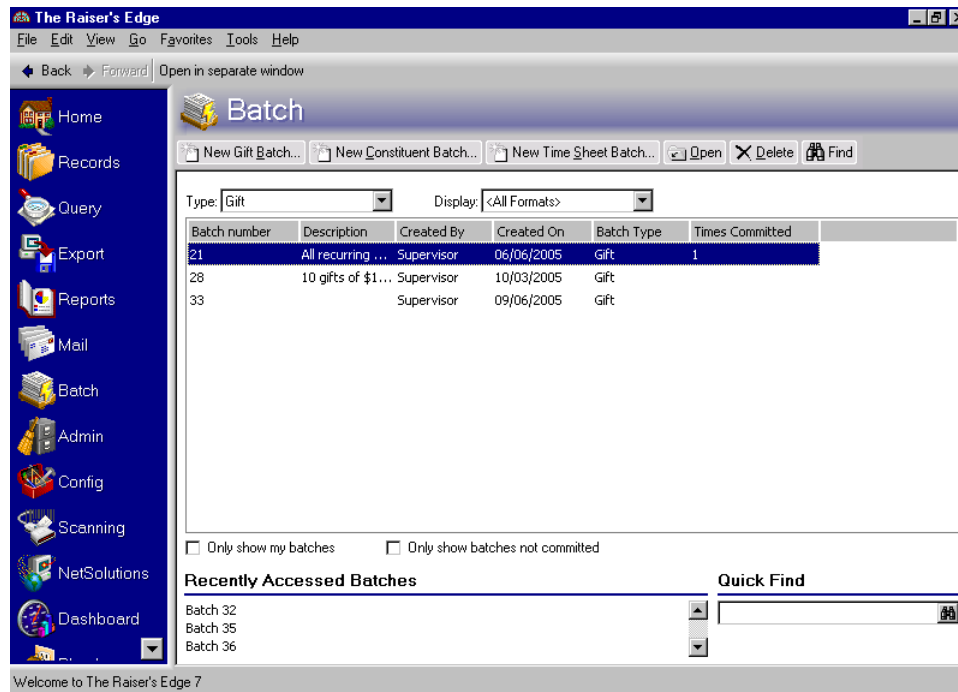
Prenotification. When you receive gifts by way of a direct debit, you can send a prenotification to the sponsoring bank. A prenotification verifies that the electronic transfer is set up properly but does not actually transfer the funds from the donor's account. You cannot process a prenotification and a financial transaction for a single gift at the same time. For more information about prenotifications, see the *Electronic Funds Transfer (EFT) Guide*.

Recurring batch. You can use recurring batches for gifts donated at regular intervals such as employee payroll deductions. For example, if a company participates in a payroll deduction plan, you can create a batch that contains the gifts received on a regular basis.

Validate. When you validate a batch, *The Raiser's Edge* checks the batch for duplicate entries and other data entry errors that may cause problems when you commit a batch to the database. For example, you enter gifts in a batch and you add two identical gifts with the same gift ID for Mark Adamson. When you validate the gift batch, *The Raiser's Edge* alerts you that duplicate gift IDs exist for Mark Adamson. If no changes are made to the batch and you commit the batch to the database, the exceptions do not commit to the database.

Navigating in Batch

You can create new gift batches and access existing gift batches from the Batch page. To access the Batch page, click **Batch** on the Raiser's Edge bar.



The grid displays all the constituent, gift, and time sheet batches in your database. To create a new gift batch, click **New Gift Batch**. You can use the **Type** and **Display** fields. For example, to display only gift batches in the grid, select Gift in the **Type** field. The **Display** field affects whether recurring or non-recurring gift batches appear in the grid. You can also mark **Only show my batches**. When you mark this checkbox, you specify that only the batches you create appear in the grid. When you mark **Only show batches not committed**, you specify that only non-committed batches appear in the grid. The Batch page also contains a list of recently accessed batches. To open any batch in this list, click the batch. To quickly find a batch, enter a batch number in the **Quick Find** field and click the binoculars to display the Data Entry screen for the batch that matches your entry.

Accessing a Gift Batch

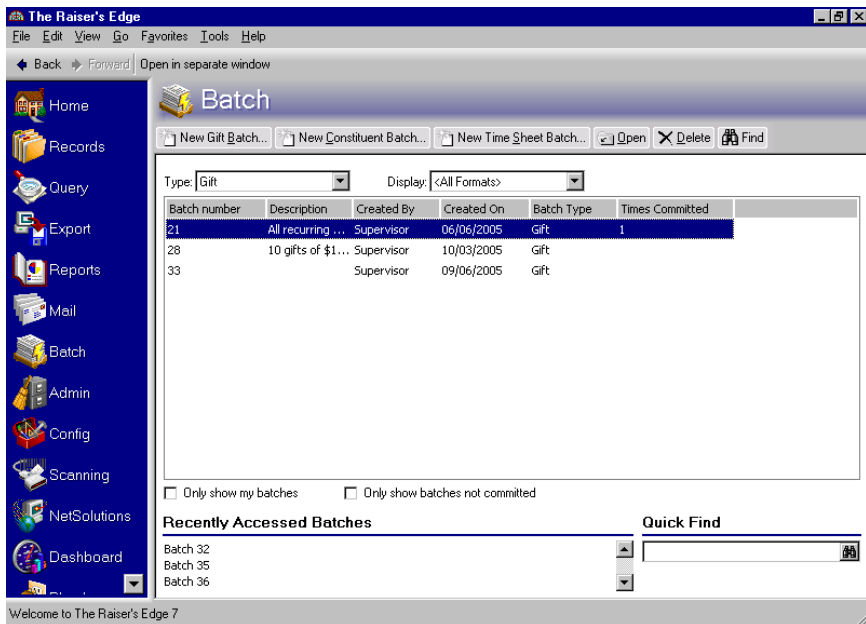
Tip: You can use shortcut keys to move around *The Raiser's Edge* without the use of your mouse. For example, press **CTRL + S** on your keyboard to save a batch or **CTRL + O** to open a batch.

From the Batch page, you can open any constituent, gift, or time sheet batch in your database. To open a batch, you must have appropriate security rights. For more information about security, see the *Configuration & Security Guide*. Also, if **Other users may access this batch** on the Gift Batch Setup screen is not marked for the batch, you cannot open the batch unless you originally created the batch.

► Opening a gift batch from the Batch page

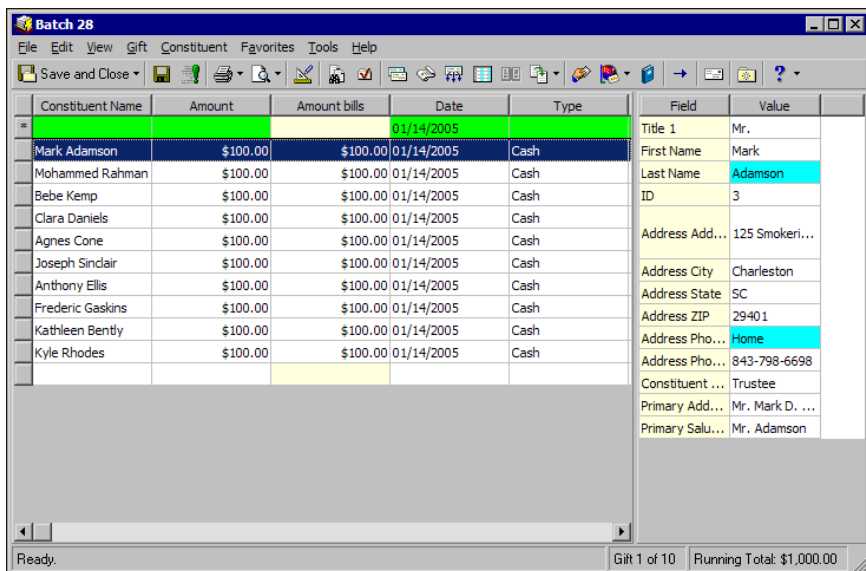
Warning: If you do not have security rights to open a constituent batch, **Other users may access this batch** has not been marked, or if you did not originally create the batch, the message "User not authorized to access this batch." appears.

1. On the Raiser's Edge bar, click **Batch**. The Batch page appears.



Tip: To narrow the number of batches that appear in the grid, you can select Gift in the **Type** field. The **Display** field affects whether recurring or non-recurring gift batches appear in the grid.

2. In the grid, select the gift batch to open.
3. On the action bar at the top of the page, click **Open**. The Data Entry screen appears.



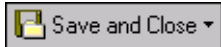
Warning: If a non-recurring gift batch has been committed to the database, you cannot edit the entries on the Data Entry screen.

4. Make any necessary changes to the batch and click **Save and Close** on the toolbar. You return to the Batch page.

Batch Toolbar

Note: You can set up a user option that enables you to view tooltips that explain the function of each toolbar command. Tooltips appear when you move your cursor across each item on the toolbar. For more information about how to set up this user option, see the User Options chapter of the *Program Basics Guide*.

The toolbar contains buttons that represent common commands for a gift batch. To save time during data entry, you can use these buttons as alternatives to menu commands.



Save and close the gift batch (**Save and New** can be accessed from the down arrow beside **Save and Close**. Use **Save and New** to save the batch, close the saved batch, and open a new batch.)



Save the gift batch



Commit the gift batch to the database



Print a report – Click the down arrow and select a report to print.



Preview a report – Click the down arrow and select a report to preview.



Access the Gift Batch Setup screen



Check for duplicate gifts in the batch



Validate the gift batch



Add a matching gift for the selected gift



Designate the current gift to a tribute



Soft credit a gift



Split a gift



Enter an installment schedule for the current pledge or recurring gift



Apply the current gift to an existing pledge or recurring gift



Link the current gift to a membership



Link the current gift to an event



Link the current gift to a proposal



Go to the constituent



Access AddressAccelerator screen



Authorize credit card transactions (available only if the optional module *Electronic Funds Transfer* is not present).



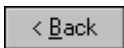
Add gift batch to favorites



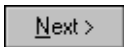
Access help from online help files, user guides, online support, or the Blackbaud Web site

Buttons

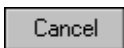
At the bottom of the Gift Batch Setup screen, several buttons appear to help you navigate through the tabs and set up your batch.



Go to the previous tab



Go to the next tab



Close the screen

Save

Save the gift batch setup

Data Entry

Open the Data Entry screen for a gift batch

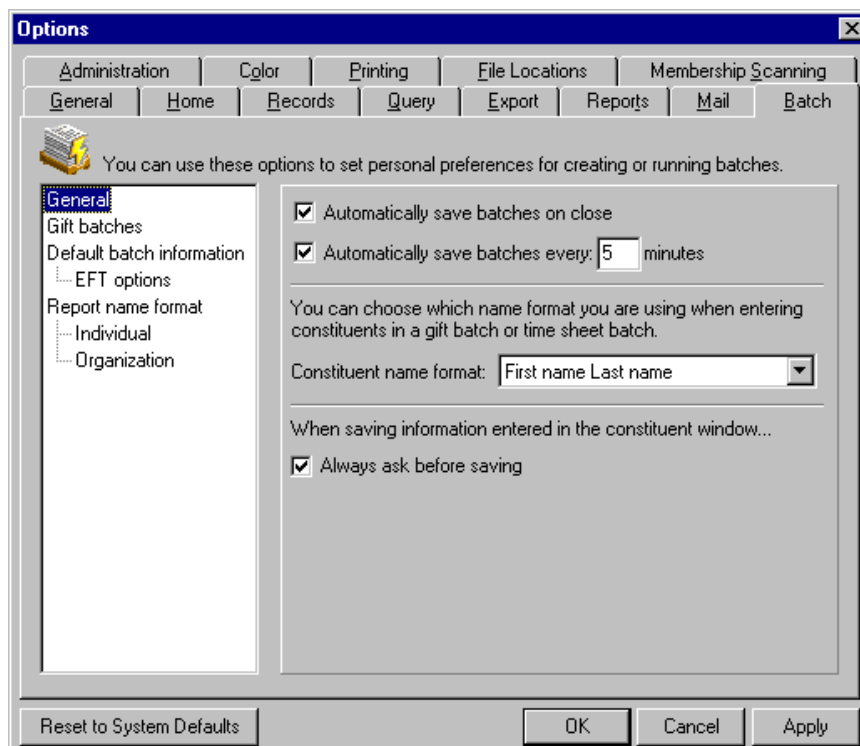
User Options

User options are preferences you set that affect how *The Raiser's Edge* looks and runs on the workstation you use. User options are login-specific, which means that if you log into any workstation with your password, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. Several user options are specific to *Batch*. For example, you can automatically save an open batch at specified time intervals, select the format for constituent names in batch reports, and specify how to add default entries to a batch. For more information about User Options, see the *Program Basics Guide*.

► Defining user options

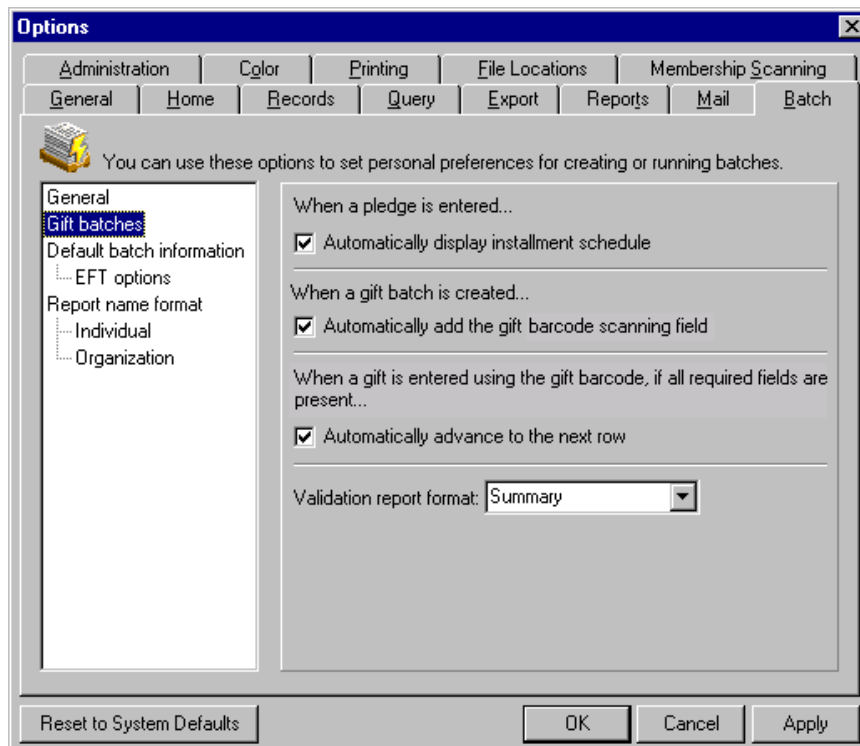
This procedure explains how to set up user options specific to *Batch*. For complete information about User Options, see the *Program Basics Guide*.

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools, User Options**. The Options screen appears.
2. Select the Batch tab.
3. From the tree view on the left side of the Options screen, select **General**. General batch user options appear on the right side of the screen.



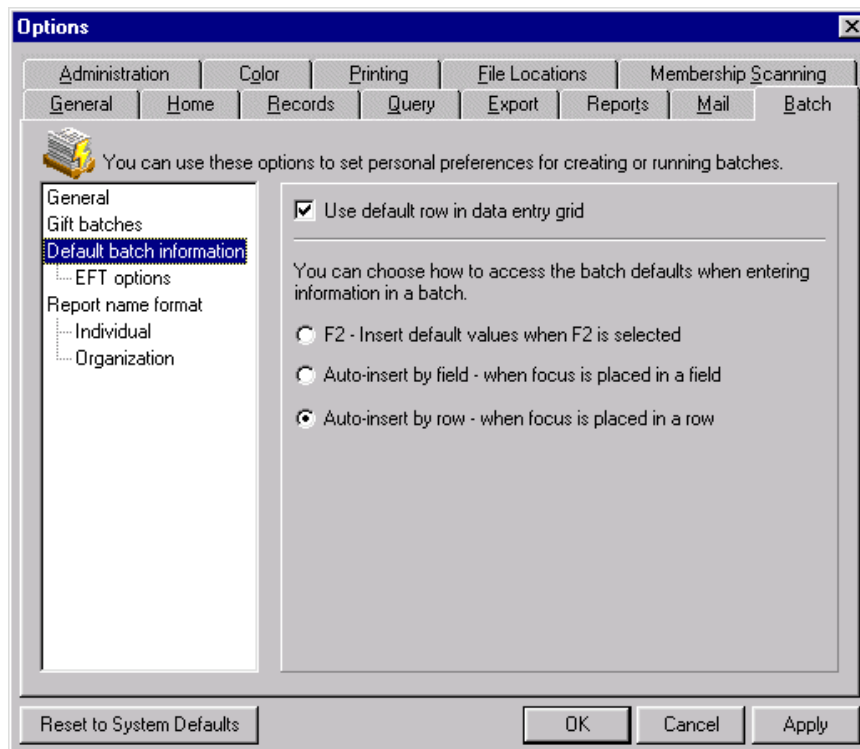
4. To automatically save the information entered in a batch when you close the Data Entry screen, mark **Automatically save batches on close**.

5. To automatically save the information entered in an open batch at regular intervals, mark **Automatically save batches every [] minutes**. When you mark this checkbox, enter the time interval used to automatically save the batch. For example, to automatically save an open batch every five minutes, enter "5" in the field.
6. In the **Constituent name format** field, select the format for the constituent names you enter in a batch. For example, to have the first name appear before the last name for a constituent, select "First name Last name".
7. To have a message appear before *The Raiser's Edge* updates the database with information entered in the Constituent Window, in the **When saving information entered in the constituent window** frame, mark **Always ask before saving**.
8. From the tree view on the left side of the Options screen, select **Gift batches**. The gift batch options appear on the right side of the screen.



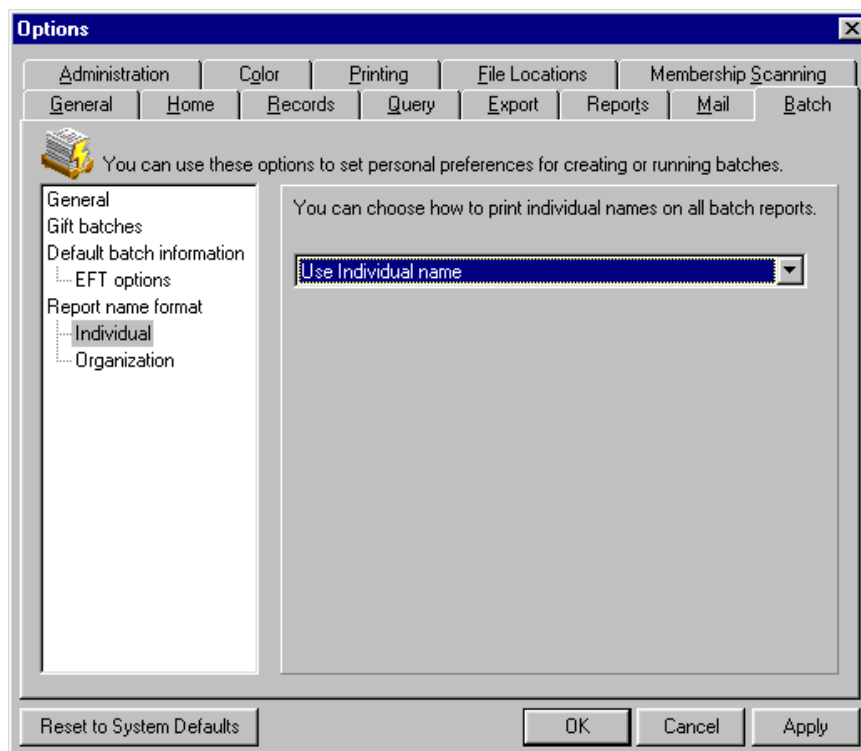
9. In the **When a pledge is entered** frame, mark **Automatically display installment schedule** to have the Pledge Installment Schedule screen appear when you select Pledge in the **Gift type** field and tab to the next row.
10. In the **When a gift batch is created** frame, mark **Automatically add the gift barcode scanning field** to have *The Raiser's Edge* automatically add this field when you create a new gift batch.
11. In the **When a gift is entered using the gift barcode, if all required fields are present** frame, mark **Automatically advance to the next row** to have *The Raiser's Edge* begin a new row in the Data Entry grid immediately after you scan the gift barcode.
12. In the **Validation report format** field, select the format for the validation report output. You can either select Detail or Summary.

13. From the tree view on the left side of the Options screen, select **Default batch information**. The default options appear on the right side of the screen.



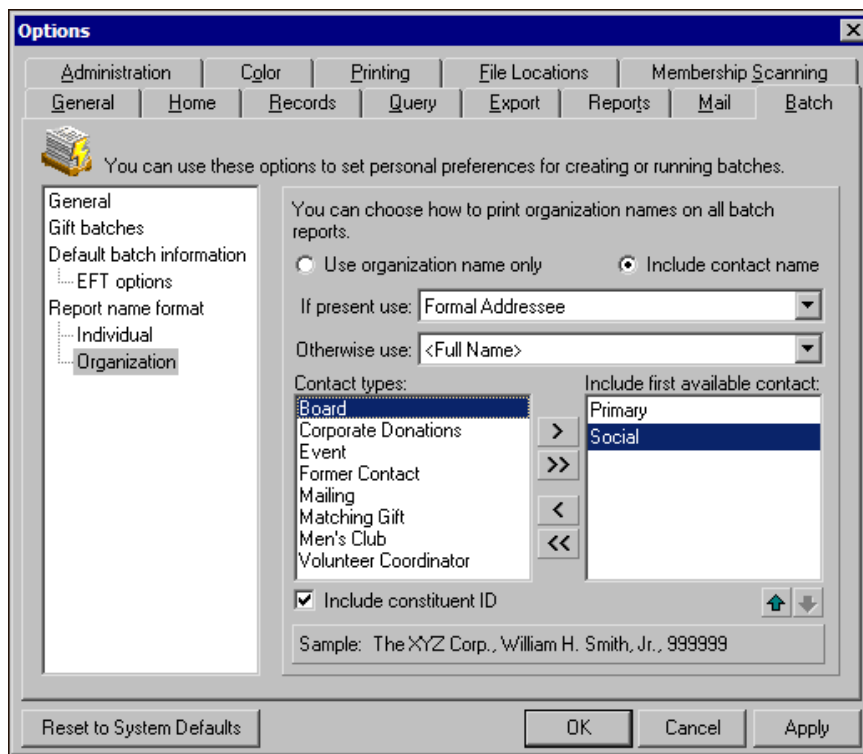
14. To display the default row in the first row of the Data Entry grid, mark **Use default row in data entry grid**.
15. Select whether to enter defaults in your batch when you press **F2** within a field, select a field, or begin a new row in the batch.
16. From the tree view on the left side of the Options screen, you can select **EFT options**. This option is available only if you use the optional module *Electronic Funds Transfer*. For more information about this user option, see the User Options section of the *Electronic Funds Transfer (EFT) Guide*.

17. From the tree view on the left side of the Options screen, select **Individual** under the **Report name format** heading. The individual name options appear on the right side of the screen.



18. In the **You can choose how to print individual names on all batch reports** field, select Use addressee from Individual, Use addressee from Configuration, or Use Individual name. If you select Use addressee from Individual or Use addressee from Configuration, additional fields appear on this screen so you can select the specific addressee to use.

19. From the tree view on the left side of the Options screen, select **Organization** under the **Report name format** heading. The name options appear on the right side of the screen.

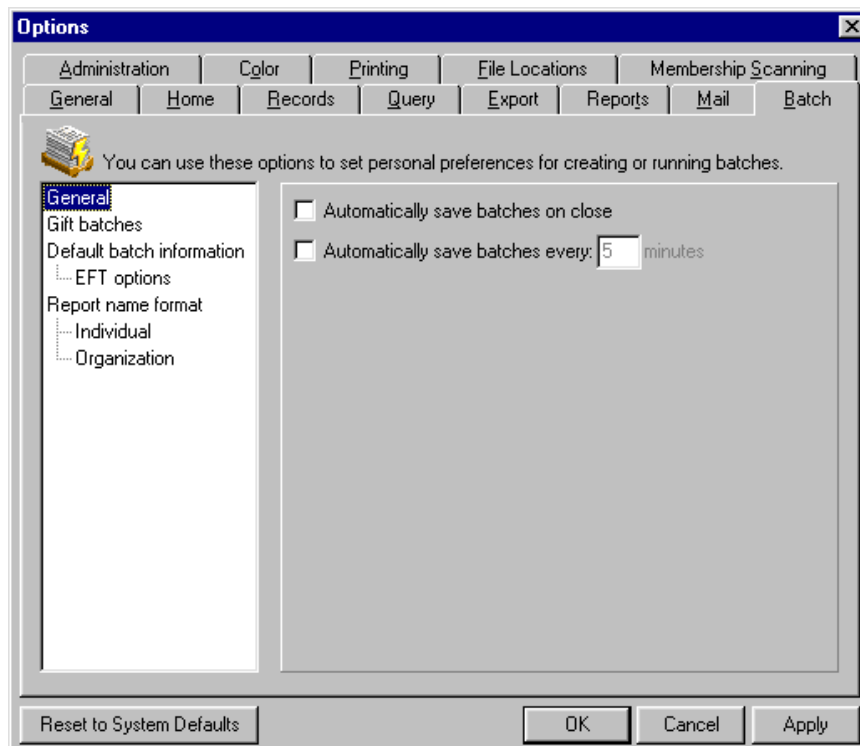


20. In the **You can choose how to print organization names on all batch reports** field, select **Use organization name only** or **Include contact name**. If you select **Include contact name**, additional fields are enabled so you can select the specific contacts to include.
21. If you mark **Include contact name**, select a format for the contact name in the **If present use** field. If that format is not entered on the contact's constituent record, select an alternative in the **Otherwise use** field.
22. To select the contact types to include, select a contact type in the **Contact types** box and click the right arrow to move it to the **Include first available contact** box. If you include multiple contact types, use the up and down arrows to arrange them in order of importance.
23. To include the constituent ID at the end of the organization name, mark **Include constituent ID**.
24. To save your changes, click **OK**.

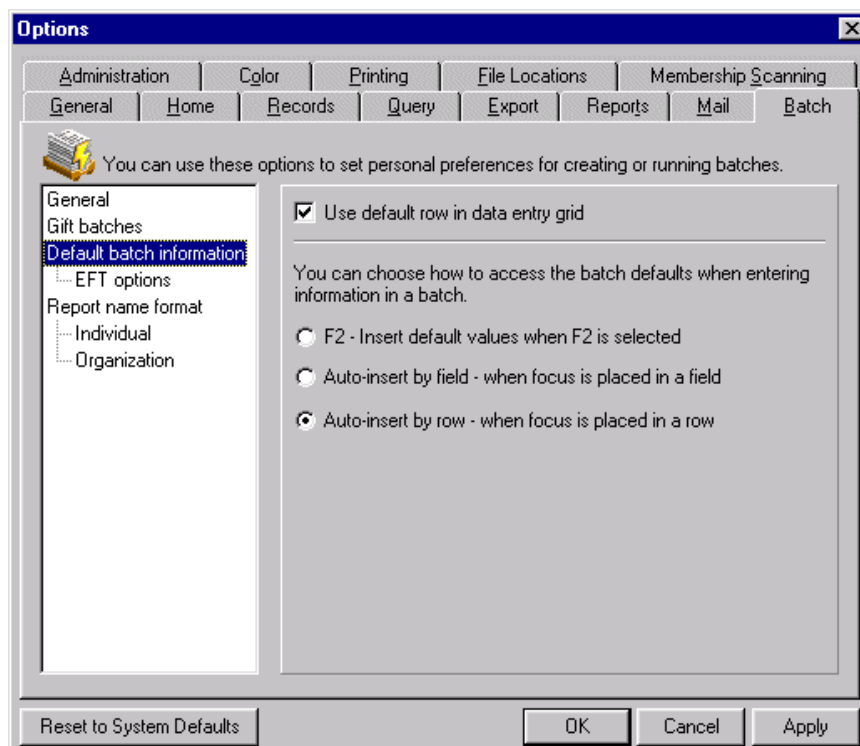
► **Displaying the default row**

1. From the menu bar of *The Raiser's Edge* shell, select **Tools, User Options** from the menu bar. The Options screen appears.

2. Select the Batch tab.

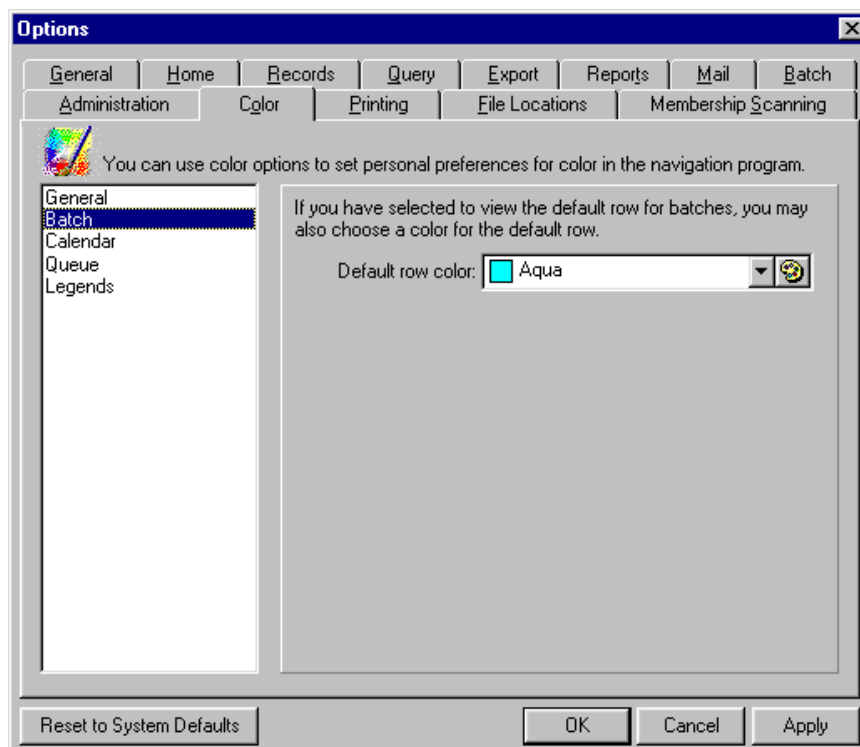


3. From the tree view on the left side of the Options screen, select **Default batch information**. The default options appear on the right side of the screen.



Note: If you hide the Default Row, it does not affect your ability to add defaults to a batch. The Default Row is a tool to see and easily change the current default settings for a batch.

4. To display the default row in the first row of the Data Entry grid, mark **Use default row in data entry grid**.
5. Select whether to enter defaults in your batch when you press **F2** within a field, select a field, or begin a new row in the batch.
6. Select the Color tab.
7. From the list on the left side of the Options screen, select **Batch**. The color options for the Default Row appear on the right side of the screen.



Note: To easily differentiate the Default Row from the Data Entry grid, we strongly recommend you display the Default Row in a different color than the Data Entry grid.

8. In the **Default row color** field, select the color in which to display the Default Row.
9. To save your changes, click **OK**.

Business Rules

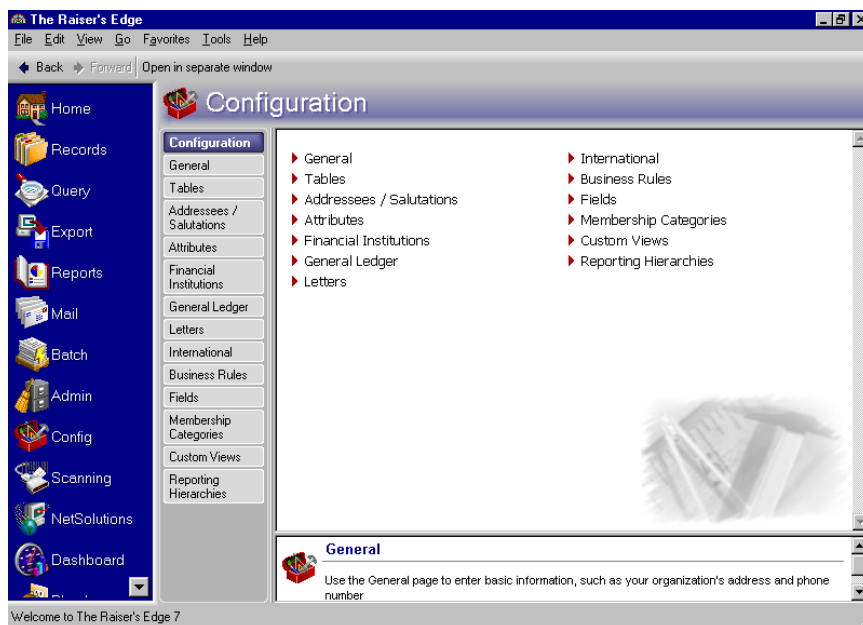
You can set up business rules to control certain functions and displays in *The Raiser's Edge*. Unlike user options, business rules affect all users of the program. Several business rules affect the way you use *Batch*. For example, each constituent, gift, and time sheet batch has a unique batch number associated with it. In business rules, you can select a meaningful format for the batch number. Also, many business rules for gift records also apply to gifts entered in *Batch*. You can select to receive warnings when you add a gift for a constituent who has an outstanding pledge balance, outstanding registration fees, or a lapsed membership. For complete information about business rules, see the *Configuration & Security Guide*.

► Defining business rules

Before you use *Batch*, you must decide how to format the batch numbers. Constituent, gift, and time sheet batches use the same format and batch numbers are not duplicated between them. For example, if you create a constituent batch with a batch number of 2005-193, the program cannot create a gift batch with the same number.

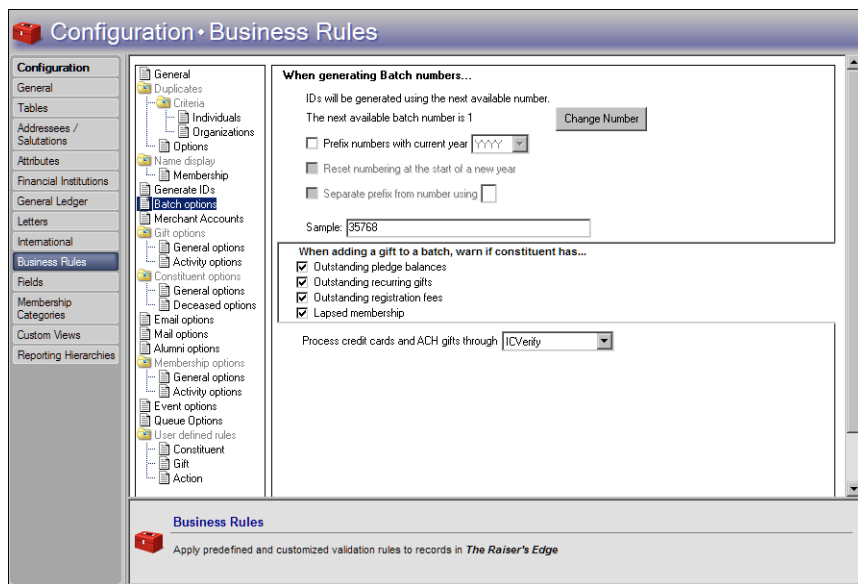
Warning: To access the **Business Rules** link in *Configuration*, you must have security rights.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.



2. Click **Business Rules**. The Business Rules page appears.

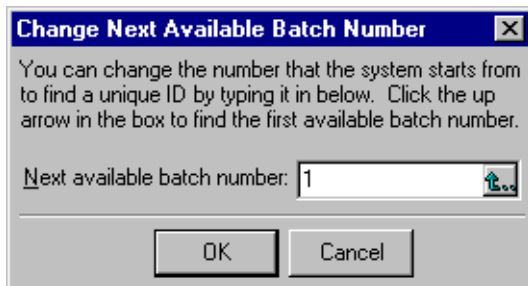
3. Select **Batch options** from the tree view. The Business Rules screen appears with the batch-related options.



Note: When you create a new batch, *The Raiser's Edge* updates the next available batch number listed in the **When generating Batch numbers** frame. The program uses this number as a reference point to begin searches for the next unused batch number.

4. To generate batch numbers, *The Raiser's Edge* searches for the lowest available number that occurs after the batch number listed in the **When generating Batch numbers** frame.

You can find and change the reference number the program uses to a unique batch number.



- a. Click **Change Number**. The Change Next Available Batch Number screen appears.
 - b. In the **Next available batch number** field, enter the number the program should use when it begins a search for the next unique batch number. If you click the search button, the program searches for the next unique batch number available.
 - c. Click **OK**. You return to the Business Rules page.
5. To display the year a batch is created before the batch number, mark **Prefix numbers with current year**. If you mark this checkbox, select whether to display the year in two or four characters.
 6. If you include the year before a batch number, **Reset numbering at the start of a new year** is enabled. If

Note: Batch numbers must be unique. Before you can **Reset numbering at the start of a new year**, you must mark **Prefix numbers with current year**.

you mark this checkbox, the program resets the next available batch number to 1 at the beginning of the year.

7. If you include the year before a batch number, **Separate prefix from number using** is enabled. If you mark this checkbox, enter the symbol to separate the sections of a batch number. For example, if you enter a hyphen in this field, the program formats the batch number as 2005-35768.
8. The **Sample** display shows an example of the batch number with the format options you select. If this display does not show the batch number as you want it to appear, modify the settings on this page.
9. To receive warnings when you add gifts in a batch for constituents who have outstanding pledge balances, mark **Outstanding pledge balances**.
10. To receive warnings when you add gifts in a batch for constituents who have outstanding recurring gifts, mark **Outstanding recurring gifts**.
11. To receive warnings when you add gifts in a batch for constituents who have outstanding event registration fees, mark **Outstanding registration fees**.
12. To receive warnings when you add gifts in a batch for constituents who have lapsed memberships, mark **Lapsed membership**.
13. Under **When authorizing credit cards**, in the **Process credit cards through** field, select IATS/Other or ICVerify. Your selection in this field specifies which credit card authorization and processing service to use.

Note: IATS supplies you with a login ID applicable to the specific country for which you set up an account. For example, a typical login ID for the United States would be 3A35546, where the first character in the login ID (3) designates this account may be used to process credit cards issued by financial institutions in the United States. For more information, see the *Electronic Funds Transfer (EFT) Guide*.

If you select IATS/Other, the **Click here to set up merchant accounts** link appears. To access the Business Rules screen for merchant accounts, click the link.

From the Business Rules screen for merchant accounts, you can add or edit merchant accounts. For detailed instructions on how to set up your merchant accounts, see the *Configuration and Security Guide*.

14. After you make changes to business rules, your changes update immediately.

The Life of a Batch

This chapter explains each step in the life of a gift batch and provides examples and procedures for each process. Regardless of whether you use a constituent, gift, or time sheet batch, every batch goes through the following steps: Setup, Data Entry, Validation, and Committing the batch to the database.

Setup. Before you add gifts to a batch, you need to set up a batch. To set up a batch, select a batch number, define the fields to enter for each gift, and specify any necessary defaults for these fields. For example, to create a gift batch to add gifts received from your Annual Mailing appeal, you can select the appropriate gift fields when you set up the batch. For more information about how to set up a gift batch, see “Gift Batch Setup” on page 93.

Note: The program uses a batch number to identify a specific batch. Each constituent, gift, and time sheet batch must have a unique batch number.

Data Entry grid. The Data Entry grid is a spreadsheet. Every field you select to appear in the batch has a column in this spreadsheet. When you add a gift batch, you add each new gift on a separate row. For more information about how to enter gifts into a gift batch, see “Gift Batch Data Entry” on page 125.

Validation. When you finish adding gifts to a batch, you can validate the batch. When you validate a batch, the program determines if any errors in data entry prevent gifts in the batch from being successfully added to your database. We strongly recommend you validate a batch before or while you commit it to the database. For more information about how to validate a gift batch, see “Validating a Batch” on page 200.

Committing a batch to the database. When you commit a gift batch to the database, the program transfers the information entered in the batch to create new gift records. For more information about how to commit a gift batch, see “Committing a Batch” on page 203.

Understanding the Multi-User Capabilities of a Gift Batch

One or more people can enter data into a single batch at the same time from different workstations. For example, Frank and Betty both need to enter new gifts into a gift batch. After a gift batch is set up, Frank and Betty can open the same batch on different workstations to enter the gift information simultaneously. If you plan to open a single batch simultaneously on different workstations, it is very important to understand how the multi-user capability works so you can complete your data entry without difficulty.

Note: You cannot change the column order or fields included in the batch when a single batch is open on more than one workstation.

When you open a single batch on multiple workstations, *The Raiser's Edge* creates a main database for the batch. Every time you save the batch open on your workstation, the program updates the main database with new information. When you open an additional copy of a batch, the new copy contains the batch settings and entries saved in the main database.

It is possible for one person to overwrite another person's entries when a batch is open on multiple workstations. For example, Betty and Frank open the same batch on different workstations. This batch already contains ten gifts. Therefore, Frank and Betty's batch files both contain the same ten gifts. Frank deletes one of the gifts from his batch file, adds a new gift, then saves his copy of the batch. When Frank saves his batch, one gift is deleted and a new gift is added to the main database. Frank's changes do not appear in the batch file on Betty's workstation.

Betty adds two gifts to her copy of the batch, and then saves her batch. When Betty saves her batch, the gift Frank deleted is added back to the main database because Betty did not delete the gift from her copy of the batch. The two gifts Betty entered are also added to the database. The main database now contains the ten original gifts, one new gift added by Frank, and two new gifts added by Betty.

New gifts are added to the main database regardless of whether Betty or Frank last saved their batch file. When a single batch is open on multiple workstations, we recommend you do not delete or edit gifts present in the main database. You can accomplish administrative tasks, such as to design or commit a batch, only when the batch is open on a single workstation.

Throughout this chapter, notes and suggestions explain additional options and considerations of which you should be aware when you use the multi-user capabilities of *Batch*.

Gift Batch Setup

To use *Batch* to add gifts to the database, you must first define basic information to set up a batch. This information includes the batch number, fields present in the batch, and defaults for these fields. When you click **New Gift Batch** on the Batch page to create a new gift batch, the Gift Batch Setup screen appears so you can view and define basic information about the batch.

Gift Batch Setup

1:Batch Header | 2:Fields | 3:Defaults

Batch Statistics

Running number of gifts:	0	Number of matching gifts:	
Running amount:	\$0.00	Matching gift amount:	\$0.00
Created on:	09/09/2005 11:31:04...	Times committed:	
Last changed on:		Last committed on:	

Batch number: 38

Projected number of gifts: 7

Projected amount: \$900.00

Automatically Display: [Dropdown]

Description: Gifts received for the 2005 Annual Fund on 09/09/2005

☐ Batch is recurring [History](#)

☐ Include batch for bank depositing

☒ Other users may access this batch

Press F7 to zoom

< Back | Next > | Cancel | Save | Data Entry

The Gift Batch Setup screen is divided into three tabs: Batch Header, Fields, and Defaults. At the bottom of each tab, several buttons are available to help you move between the tabs. For more information about the buttons on this screen, see "Buttons" on page 82.

Batch Header Tab

Note: You can use shortcut keys to move around *The Raiser's Edge* without the use of your mouse. For example, press **ALT + 2** on your keyboard to select the Fields tab, or **ALT + 3** to select the Defaults tab.

On the Batch Header tab, you select a batch number and enter a description to explain the contents of the batch. This tab also displays **Batch Statistics**, such as the number of gifts in the batch and the user who created the batch. For gift batches, each time you create and save a new gift batch, the settings from the Batch Header tab are automatically defaulted into the next new gift batch you create. For example, you create a new gift batch, mark **Batch is recurring** on the Batch Header tab, and save the batch. The next time you create a new gift batch, this checkbox is automatically marked. This only affects new gift batches, not gift batches that are updated and saved. In addition, when you mark **Other users may access this batch**, regardless of the type of batch you create, this setting is saved and automatically defaults to marked the next time you create a new batch.

Gift Batch Setup

1:Batch Header 2:Fields 3:Defaults

Batch Statistics

Running number of gifts:	0	Number of matching gifts:	
Running amount:	\$0.00	Matching gift amount:	\$0.00
Created on:	09/09/2005 11:31:04...	Times committed:	
Last changed on:		Last committed on:	

Batch number: 38

Projected number of gifts: 7

Projected amount: \$900.00

Automatically Display: [] []

Description: Gifts received for the 2005 Annual Fund on 09/09/2005

☐ Batch is recurring **History**

☐ Include batch for bank depositing

☒ Other users may access this batch

Press F7 to zoom

< Back Next > Cancel Save Data Entry

Batch Statistics

At the top of the Batch Header tab, the **Batch Statistics** grid displays a variety of information.

- The number of gifts currently entered in the batch
- The running amount of gifts in the batch
- The date and time the batch was created, last changed, and last committed
- The user name for the person who originally created the batch.

Although you cannot edit this information, the program updates this grid every time you save the batch.

Running number of gifts. The **Running number of gifts** display shows the number of gifts currently entered in this batch. For pledge gifts, the total number of pledges is included in the **Running number of gifts**. However, matching gifts and gifts entered with the **Gift, Add Payment to Pledge/Recurring Gift** menu option are not included in this total. These gifts are listed separately on selected reports and on the Batch Commit Complete screen. In addition, any cash gifts created as a result of a pledge overpayment are not included in the running number of gifts total.

Note: If the batch is open on more than one workstation, the **Batch Statistics** grid displays information about the gifts in the main batch database plus any additional gifts you entered in the batch open on your workstation.

Running amount. The **Running amount** display shows the total monetary amount for the gifts entered in this batch. For pledge gifts, the **Running amount** includes the total pledge amount. However, matching gifts and gifts entered with the **Gifts, Add Payment to Pledge/Recurring Gift** menu option are not included in this total. These gifts are listed separately on selected reports and on the Batch Commit Complete screen. In addition, any cash gifts created as a result of a pledge overpayment are not included in the running amount total.

Created on. The **Created on** display shows the date and time the batch was first created.

Note: System dates and times are formatted as you specify in the **Short Date Style** field on the Date tab and the **Time Style** field on the Time tab of the Regional Settings Properties screen. To access this screen, open the *Windows Control Panel* on your computer and click **Regional Settings**.

Last changed on. The **Last changed on** display shows the date and time the batch was last changed. A date and time does not appear in the **Last changed on** display until you save the batch for the first time. Then, the date updates every time you save the batch. If the batch is open on more than one workstation, the **Last changed on** display shows the date and time the main database was last updated.

Created by. The **Created by** display shows the user name of the person who originally created the batch. For example, if this batch was created by the Supervisor, "Supervisor" appears in this display.

Number of matching gifts. The **Number of matching gifts** display shows the number of matching gifts entered in the batch. If the batch is open on more than one workstation, this display shows the number of matching gifts in the main batch database plus any additional matching gifts you enter in the batch open on your workstation. For example, if ten matching gifts are in the main batch database and you add two additional matching gifts to the batch file open on your workstation, the **Number of matching gifts** display shows 12 matching gifts are present in the batch.

Matching gift amount. The **Matching gift amount** display shows the total monetary amount for the matching gifts entered in the batch. If the batch is open on more than one workstation, this display shows the amount for the matching gifts in the main batch database plus the amount for any additional matching gifts entered in the batch open on your workstation. For example, if matching gifts totaling \$400 are present in the main batch database and you add an additional matching gift of \$10 to the batch open on your workstation, the **Matching gift amount** displays \$410.

Times committed. The **Times committed** display shows the number of times you committed the batch to the database. You can commit a non-recurring batch to the database only once. Therefore, the **Times committed** displays a 0 or 1 for a non-recurring batch. There is no limit to the number of times you can commit a recurring batch to the database.

Last committed on. The **Last committed on** display shows the date the batch was last committed to the database. A date does not appear in this field until you commit the batch. If the batch is recurring, **Last committed on** updates every time you commit the batch.

Exported. If you use Blackbaud's **Bank Reconciliation**, the bank name and date appear in the **Exported** display if the batch was exported through **Bank Reconciliation**.

Batch Numbers

The Raiser's Edge tracks each constituent and gift batch with a unique number, called a batch number. When you create a new batch, the program automatically generates a batch number and assigns it to the batch. You can use this number or select your own number. If you select your own number, you can assign numbers and letters to the batch you create.

When the program generates a batch number, it selects the lowest unused batch number and formats the batch number based on specifications you enter in *Configuration*. To define this format, click the **Business Rules** link on the *Configuration* page. For information about how to define the batch number format, see “Defining business rules” on page 90.

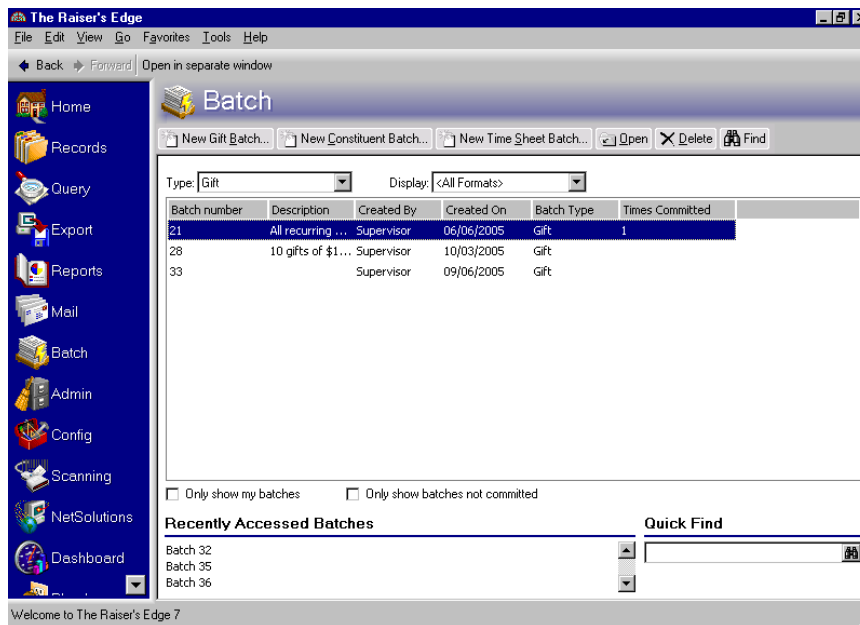
If you select your own batch number, you must verify that this batch number has not been used for another gift or constituent batch. Regardless of how you select the batch number, it must be unique for each batch you create.

When you open a batch, the batch number appears in the top corner of the screen. When you click on the Batch page, the batch number appears next to each corresponding batch in the grid. From a gift record, you can determine which batch number is associated with a specific gift. Open the gift record and select **File, Properties** from the menu bar. The batch number is listed on the Properties screen.

► Determining whether a batch number has been used

Each constituent, gift, and time sheet batch must have a unique batch number. If you select your own batch number, you need to determine whether the batch number has already been used for another batch.

1. On the Raiser's Edge bar, click **Batch**. The Batch page appears.



2. Click **New Gift Batch**. The Gift Batch Setup screen appears.

3. Select the Batch Header tab.

The screenshot shows the 'Gift Batch Setup' dialog box with the 'Batch Header' tab selected. The 'Batch Statistics' section displays the following data:

Running number of gifts:	0	Number of matching gifts:	
Running amount:	\$0.00	Matching gift amount:	\$0.
Created on:	09/09/2005 11:31:04...	Times committed:	
Last changed on:		Last committed on:	

Below the statistics, the 'Batch number' is set to 38, 'Projected number of gifts' is 7, and 'Projected amount' is \$900.00. The 'Description' field contains 'Gifts received for the 2005 Annual Fund on 09/09/2005'. There are three checkboxes: 'Batch is recurring' (unchecked), 'Include batch for bank depositing' (unchecked), and 'Other users may access this batch' (checked). A 'History' button is next to the 'Batch is recurring' checkbox. At the bottom, there are buttons for '< Back', 'Next >', 'Cancel', 'Save', and 'Data Entry'.

4. Click the batch number lookup button next to the **Batch number** field. The Open screen for batches appears.

The screenshot shows the 'Open' dialog box for batch number lookup. The 'Find' field is set to 'Batch'. The 'Find Batches that meet these criteria' section includes the following fields:

- Batch number: 38
- Batch description:
- Batch type: Gift
- Created on:
- Created by:
- Last committed on:

There are also four checkboxes: 'Exact match only' (unchecked), 'Display recurring batches' (unchecked), 'Display only open batches' (unchecked), and 'Include for bank deposit?' (unchecked). On the right side, there are buttons for 'OK', 'Cancel', 'Options', 'Find Now', 'New Search', 'Previous Search', and 'Expand Results'.

Note: To access a complete list of used batch numbers, leave the criteria fields blank and click **Find Now**.

5. In the **Batch number** field, enter the batch number to verify and click **Find Now**. For example, to determine whether "38" has been used as a batch number, enter "38" in the **Batch number** field and click **Find Now**. If you cannot locate a batch associated with this number, the batch number has not been used before and you can use it for the new batch you create.

6. After you verify whether the batch number has been used, click **OK**. You return to the Batch Header tab of the Gift Batch Setup screen.

Projected Number and Amount of Gifts

Warning: When you create a new batch, the **Edit Batch** security option does not affect the **Projected number of gifts** or **Projected Amount** fields. However, once you save the batch, these fields are disabled if you do not have **Edit Batch** rights.

In the **Projected number of gifts** field, enter the number of gifts you plan to enter in the batch. In the **Projected amount** field, enter the projected monetary amount for the gifts you plan to enter in the batch. For example, you create a batch that contains the gifts you received on the previous day. Yesterday, you received 10 gifts totaling \$500. Enter “10” as the projected number of gifts and \$500 as the projected amount. Although you are not required to enter these projections, we recommend you enter them because the program uses your projections to determine the accuracy of the data entry when you validate the batch.

Automatically Display

You can select a focus for the batch in the **Automatically Display** field. For example, if you use the optional module *Honor/Memorial Tracking*, you may want to enter all gifts received for a particular tribute in a specific batch. Because all gifts in the batch will be designated toward an honor/memorial, the batch has an honor/memorial focus. When you select a focus, the appropriate Data Entry screen automatically appears when you reach the end of each row in the batch. If you select Honor/Memorial in the **Automatically Display** field, the Honor/Memorials screen automatically appears when you complete the row. In this case, if you select the Honor/Memorial focus, you do not need to select **Gift, Tribute** from the menu bar to assign tribute information.

Not every gift in the batch must have a focus. For example, to add a gift to the batch that is not designated toward an honor/memorial, you can close the Honor/Memorials screen when it appears without adding any information. To change the focus for the batch at any time, select **Tools, Edit Batch Setup** from the menu bar. If you change the focus, the new focus applies only to new gifts entered and does not affect previously entered gifts.

Membership

If you use the optional module *Membership Management*, the **Membership** option is available. When you select Membership in the **Automatically Display** field, the Link Gift to Membership screen appears when you reach the end of each row in the batch. From this screen, you can credit dues for existing memberships and add new memberships for the constituent donating the gift.

To access the Link Gift to Membership screen, select **Gift, Links** from the menu bar. When the submenu appears, select **Membership**. For more information about how to link a gift to a membership, see the *Membership Gifts Guide*.

Link Gift to Membership

Link memberships to this gift by selecting the membership and then choosing the appropriate option from the transaction bar. You may also link to the selected transaction by checking the Link column.

Gift amount: \$100.00

New Membership Open Renew Rejoin Upgrade during cycle Downgrade during cycle

Link?	Transa...	Category	Amount Applied	Expires On	Program	Subcategory	Standing
<input type="checkbox"/>	Renewal	Contributor	\$100.00	11/30/2004	Adopt an Animal	Tiger	Active
<input checked="" type="checkbox"/>	Joined	Young Ma...	\$100.00	11/27/2002	Young Explorers		Active

View Transaction History Load Memberships From...

Applied to Events: \$0.00 Available to Apply: \$0.00 Total Applied: \$100.00

OK Cancel

Event Registration Fees

If you use the optional module *Event Management*, the **Event Registration Fees** option is available. When you select Event Registration Fees in the **Automatically Display** field, the event search field is enabled. You use the event search field to search for a default event to appear when you link gifts to events through a batch. Although you can select a default event on the batch design screen, you can still select different events once you begin to work in the batch. Your selection simply acts as default information.

When you select Event Registration Fees in the **Automatically Display** field, the Pay Registration Fees screen appears when you reach the end of each row in the batch. From this screen, you pay registration fees for events and add new registration information for the constituent donating the gift. To access the Pay Registration Fees screen, select **Gift, Links, Event, Registration Fees** from the menu bar.

Pay Registration Fees

Pay registration fees with this gift by selecting "Link?" next to the registration fees you wish to pay. Selecting "Load Registration From..." will add registration fees for other participants to the list. You may select "New Registration" in order to add a new participant to an event.

Gift amount: \$100.00

New Registration New Registration for Grouped Event Open Participant

Link?	Event Desc	Date	Participant	Status	Attended	Amount Applied	Constitue
<input type="checkbox"/>	Afternoon Tea	06/21/2008	Lucy G. Avdee...	Paid	<input type="checkbox"/>		Lucy G. Avde...
<input type="checkbox"/>	Playground Gr...	09/30/2007	Lucy G. Avdee...	Paid	<input checked="" type="checkbox"/>		Lucy G. Avde...

Load Registrations From...

Applied to Membership: \$0.00 Applied: \$0.00 Remaining: \$100.00

OK Cancel

If you select a default event on the batch design screen and click **New Registration** on the Pay Registration Fees screen, a screen appears to ask you to select the type of participant to add. On the batch design screen, you can change the event you select as default.

The Raiser's Edge

Event: Alta Tennis Tournament

Please specify the type of participant you are adding.

☒ Registrant

☐ Guest

☐ Sponsor

OK Cancel

When you specify the type of participant to add, the standard event registration screen appears. For more information about how to pay event registration fees, see the *Event Gifts Guide* and the *Event Management Data Entry Guide*.

If you select a default event on the batch design screen and click **New Registration for Grouped Event** on the Pay Registration Fees screen, the Grouped Event Registration Wizard appears. On the batch design screen, you can change the event you select as default. For more information about the Grouped Event Registration Wizard, see the *Event Management Data Entry Guide*.

Event Sponsoring Pledges

If you use the optional module *Event Management*, the **Event Sponsoring Pledges** option is available. When you select Event Sponsoring Pledges in the **Automatically Display** field, the event search field is enabled. You can use the event search field to search for a default event to appear when you link gifts to events through a batch. Even though you can select a default event on the batch design screen, you can still select different events once you begin to work in the batch. Your selection simply acts as default information.

When you select Event Sponsoring Pledges in the **Automatically Display** field, the New Sponsoring Pledge screen appears when you reach the end of each row in the batch. From this screen, you can link a sponsoring pledge to a participant record. To access the New Sponsoring Pledge screen, select **Gift, Links** from the menu bar. When the submenu appears, select **Event, Sponsoring Pledges**.

New Sponsoring Pledge

You may indicate which participant to sponsor with this sponsoring pledge by selecting 'Link?' next to the appropriate participant registration. The entire amount of this pledge will be applied. Selecting 'Load Registrations From...' will add registration information for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.

Gift amount: \$100.00

New Registration New Registration for Grouped Event Open Participant

Link?	Event ID	Date	Participant	Status	Attended	Constituent
<input type="checkbox"/>	Fire Prevention		Orla A. McGrann	Complimentary	<input type="checkbox"/>	Orla A. McGrann
<input checked="" type="checkbox"/>	Volunteer Dinner	12/17/2005	Orla A. McGrann	Complimentary	<input type="checkbox"/>	Orla A. McGrann
<input type="checkbox"/>	CPR Training Session		Orla A. McGrann	Complimentary	<input type="checkbox"/>	Orla A. McGrann

Load Registrations From...

OK Cancel

If you select a default event on the batch design screen and select to add a new registration from the New Sponsoring Pledge screen, a screen appears and asks you to select the type of participant to add. You can also change the event you select as default on the batch design screen.

The Raiser's Edge

Event: Alta Tennis Tournament

Please specify the type of participant you are adding.

☒ Registrant
☐ Guest
☐ Sponsor

OK Cancel

Once you specify the type of participant to add, the standard event registration screen appears. For more information about how to create sponsoring pledges, see the *Gift Records Guide* and the *Event Management Data Entry Guide*.

Event Other Donations

If you use the optional module *Event Management*, the **Event Other Donations** option is available. When you select Event Other Donations in the **Automatically Display** field, the event search field is enabled. You can use the event search field to search for a default event to appear when you link gifts to events through a batch. Even though you can select a default event on the batch design screen, you can still select different events once you begin to work in the batch. Your selection simply acts as default information.

When you select Event Other Donations in the **Automatically Display** field, the New Donation screen appears when you reach the end of each row in the batch. From this screen, you can link a donation to a participant record. To access the New Donation screen, select **Gift, Links** from the menu bar. When the submenu appears, select **Event, Other Donations**.

New Donation

You may link this gift as a donation for a participant registration by selecting 'Link?' next to the appropriate participant registration. The entire amount of this gift will be applied. Selecting 'Load Registration From...' will add registration information for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.

Gift amount: \$100.00

☒ New Registration
 ☐ New Registration for Grouped Event
 ☐ Open Participant

Link?	Event ID	Participant	Status	Attended	Constituent
<input type="checkbox"/>	Volunteer Dinner	Orla A. McGrann	Complimentary	<input checked="" type="checkbox"/>	Orla A. McGrann
<input checked="" type="checkbox"/>	CPR Training Session	Orla A. McGrann		<input type="checkbox"/>	Orla A. McGrann
<input type="checkbox"/>	Fire Prevention	Orla A. McGrann	Complimentary	<input type="checkbox"/>	Orla A. McGrann

Load Registrations From...

OK Cancel

If you select a default event on the batch design screen and select to add a new registration from the New Donation screen, a screen appears and asks you to select the type of participant to add. You can also change the event you select as default on the batch design screen.

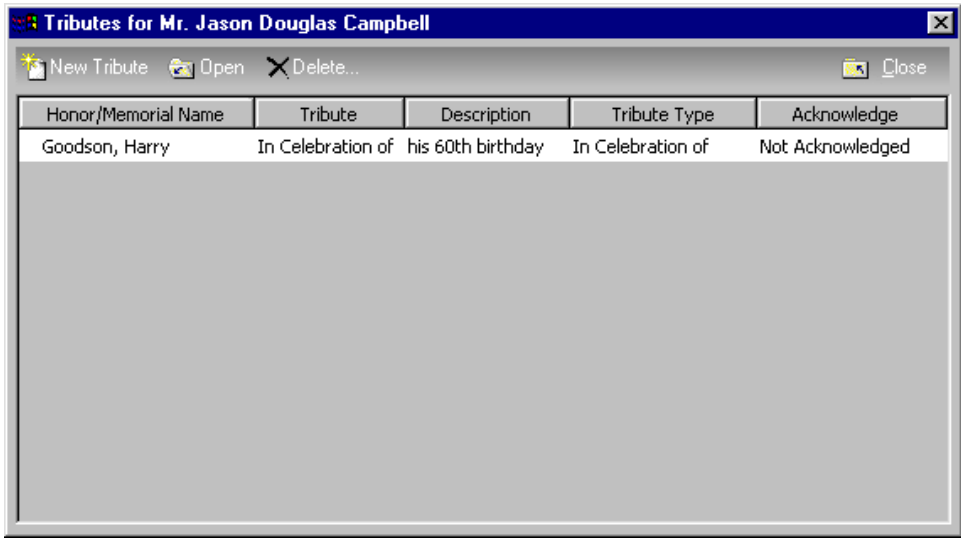


Once you specify the type of participant you are adding, the standard event registration screen appears. For more information about how to link a donation to a participant record, see the *Event Gifts Guide* and the *Event Management Data Entry Guide*.

Honor/Memorial

If you use the optional module *Honor/Memorial Tracking*, the **Honor/Memorial** option is available. When you select Honor/Memorial in the **Automatically Display** field, the Tributes screen appears when you reach the end of each row in the batch. From this screen you can designate a gift to a specific tribute.

To access the Tributes screen, select **Gift, Tribute** from the menu bar. For more information about how to designate a gift to a tribute, see the *Tribute Gifts Guide*.



Proposal

If you use the optional module *Prospect Research Management*, the **Proposal** option is available. When you select Proposal in the **Automatically Display** field, the Link Gift to Proposal screen appears when you reach the end of each row in the batch. From this screen you can link a gift to a specific proposal.

To access the Link Gift to Proposal screen, select **Gift, Links** from the menu bar. When the submenu appears, select **Proposal**. For more information about how to link a gift to a proposal, see the *Proposal Gifts Guide*.

Link Gift to Proposal

Link proposals to this gift by selecting the proposal and choosing 'Link?'.

Gift amount:

New Proposal Open Proposal Find...

Link?	Name	Purpose	Campaign	Fund	Amount Applied	Constituent
<input checked="" type="checkbox"/>	Scholarship...	Research E...	Scholarship Camp...	Smith-Brown Sch...		Sean A. Daven...

Available to Apply: \$100.00 Total Applied: \$0.00

Batch Description

Note: In the **Description** box, you can enter up to 255 characters to describe the contents of the batch.

A batch description explains why you add the gifts to your database. For example, you can enter the description "Gifts received on 07/01/2005 from Prospect Direct Mailing". This description appears on the screen so you can determine the purpose for the batch before you open it. We recommend you add a description so you can quickly find a batch.

Recurring Batches

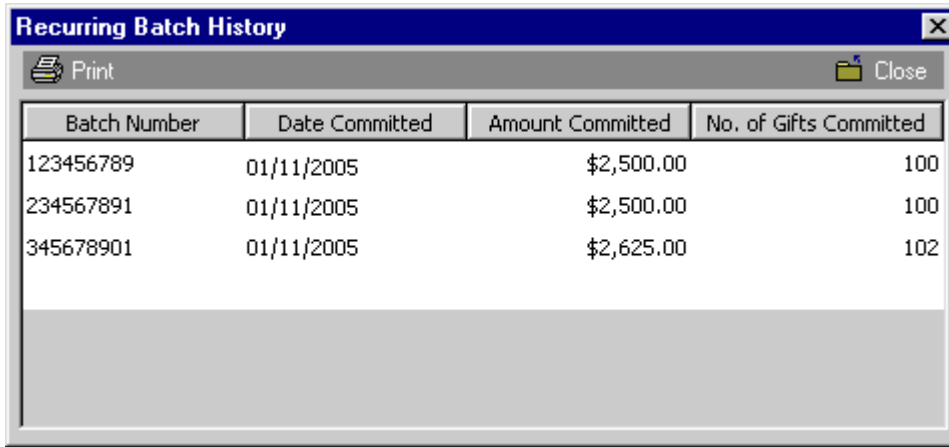
Note: Once you select Terminated or Completed in the **Status** field and save the recurring gift template, you cannot generate recurring gifts from the template again unless you change the **Status** back to Active.

You can use and commit a recurring batch many times. You may want to use a recurring batch for gifts donated at regular intervals, such as employee payroll deductions. For example, if a company participates in a payroll deduction plan, you can create a batch that contains the gifts received on a regular basis. When you receive a check from the company for the gifts, you can re-commit the batch to add another gift for each constituent who participates in the payroll deduction plan. To indicate a batch is recurring, mark **Batch is recurring** on the Batch Header tab.

If the batch is recurring, you can link a gift to a pledge, membership, event, proposal, or recurring gift the same way you do for a non-recurring batch. However, the link is not retained after you commit the batch. You need to link the gift to the membership, proposal, event, pledge or recurring gift each time you commit the recurring batch.

Note: For recurring batches, we recommend you enter transactions for recurring gifts that have the same payment schedule. For example, you have recurring gifts due on the 1st of every month and another set of recurring gifts due on the 15th of every month. You need to include the gifts for the 1st of the month in one batch and gifts due on the 15th of the month in a separate batch.

Each time you commit a recurring batch, *The Raiser's Edge* generates a new batch number. To view the batch numbers assigned to the recurring batch, click **History** on the Batch Header tab. When you click **History**, the Recurring Batch History screen appears and displays the batch numbers committed with this recurring batch.



Batch Number	Date Committed	Amount Committed	No. of Gifts Committed
123456789	01/11/2005	\$2,500.00	100
234567891	01/11/2005	\$2,500.00	100
345678901	01/11/2005	\$2,625.00	102

This grid displays the batch number and date, amount committed, and number of gifts committed with this recurring batch. This screen is for informational purposes only.

To print the Recurring Batch History grid to your default printer, click **Print** on the action bar. To export the Recurring Batch History grid to *Excel* or another application, right-click the mouse within the grid. When the shortcut menu appears, select **Export to Excel** or **Export Recurring Batch History Grid**. When you finish viewing the history of the recurring batch, click **Close**. You return to the Batch Header tab of the Gift Batch Setup screen.

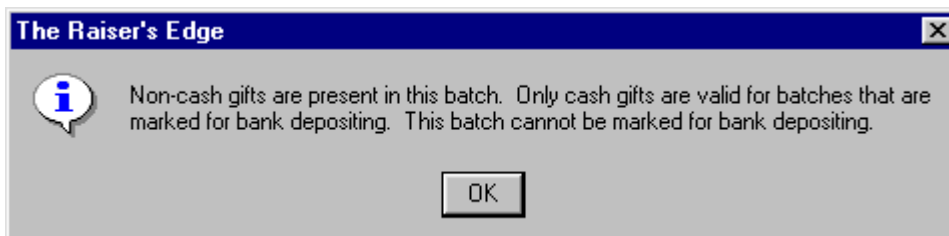
When you commit recurring batches, the Recurring Batch tab appears on the Commit Gift Batch screen. On this tab, you can select a date to use in the **Gift date** field. This date specifies the date that the recurring batch is being committed. You can also enter a date you want to post the batch to *General Ledger* or another accounting software package. You can change the batch number for the batch and also view the recurring batch history. To clear credit card authorization codes and rejection codes from a recurring batch, mark **Clear credit card authorization codes** and **Clear rejection codes**.

It is important to note that you can add amendments to recurring gifts. You can work with amendments from the Amendments tab of a recurring gift record and by using the **Amendment** category in *Import*. You cannot, however, add recurring gift amendments through *Batch*. For more information about recurring gift amendments, see the Recurring Gifts chapter of the *Gift Records Guide*.

Batches for Bank Deposit

Note: If this batch is open on more than one workstation, you cannot change the deposit status for the batch.

To include a batch for bank depositing, mark **Include batch for bank depositing**. When you mark this checkbox, you can print a deposit ticket for the gifts entered in the batch. For more information about how to print a deposit ticket, see "Deposit Ticket" on page 213. You can mark and unmark this checkbox at any time. However, when you mark this checkbox, the batch can contain only cash gifts. If you mark this checkbox and non-cash gifts are present in the batch, a message appears.



When you mark **Include batch for bank depositing**, Cash is automatically selected as the default for the **Type** field, and the **Type** field is hidden in the batch. For more information about how to hide fields in a batch, see “Hiding a Field” on page 111.

Batch Access

When you create a batch, you can mark **Other users may access this batch** to enable others to use and enter information into the batch. If a batch contains sensitive information, such as a constituent’s income or credit card numbers, you may want to limit batch access only to the person who created the batch and not mark this checkbox.

Fields Tab

Note: If a batch is open on more than one workstation, you cannot modify the selections on the Fields tab.

On the Fields tab, you can select the fields to appear on the Data Entry screen for the gift batch. For example, if you create a gift batch to enter gifts received from your Annual Mailing appeal, you can use the Fields tab to select the gift fields in which you want to add information.

The screenshot shows the 'Gift Batch Setup' dialog box with the '2:Fields' tab selected. The dialog has three tabs: '1:Batch Header', '2:Fields', and '3:Defaults'. Below the tabs is a text box that says 'Select the fields to be used for data entry in this batch.' The main area is divided into two columns. The left column, titled 'Gift fields:', contains a list of fields with expandable icons (+) next to them: Acknowledge, Acknowledge date, Amount, Amount bills, Amount coins, Anonymous, Appeal, Authorization code, Bank, Campaign, Cardholder name, Check date, Check number, Constituent Code, Constituent ID, and Constituent Name. The right column, titled 'Data entry fields:', contains a list of selected fields: Constituent Name, Amount, Date, Type, Fund, GL post date, and GL post status. Between the two columns are '>' and '<' buttons. To the right of the 'Data entry fields' list are 'Up' and 'Down' buttons. At the bottom left is a 'Find...' button with a magnifying glass icon. At the bottom right is a 'Load from Existing Batch...' button. The bottom of the dialog has navigation buttons: '< Back', 'Next >', 'Cancel', 'Save', and 'Data Entry'.

Warning: Depending on how your system is configured, you may not have appropriate security rights to select some of the available fields. For more information about security rights, see the *Configuration & Security Guide*.

The **Gift fields** box displays a list of all fields available to include in a gift batch. When a + symbol appears next to an entry in the **Gift fields** box, click the + symbol to view a list of field names grouped under the heading. The **Data entry fields** box displays all fields you select to appear on the Data Entry screen of the gift batch.

When you move a field to the **Data entry fields** box, the field appears at the bottom of the box, unless you select the **Gift Barcode** field. The **Gift Barcode** field appears at the top of the list. Once you move the fields to the **Data entry fields** box, you can rearrange or move all of them.

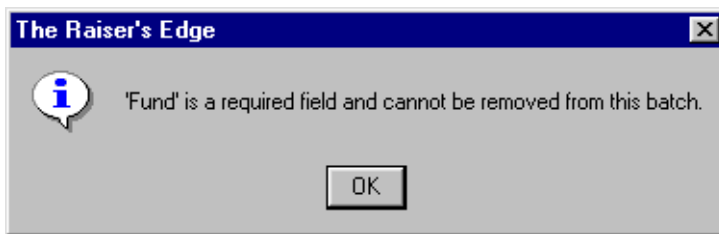
Required Fields for Gift Batches

Tip: To quickly locate fields in the **Gift fields** box, use the **Find** button.

The **Constituent Name**, **Amount**, **Date**, **Type**, **Fund**, **GL post date**, and **GL post status** fields automatically appear in the **Data entry fields** box because these fields are required for all gift batches. Also, the program automatically includes any fields made required with the **Fields** link in *Configuration*. For example, if you make **Letter code** a required field, you must include the **Letter code** field in all gift batches. For information about how to designate fields as required, see the *Configuration & Security Guide*.

Note: When a batch has been marked for bank depositing, the **Type** field appears in the **Data entry fields** box on the Fields tab. The default on the Defaults tab is set to Cash and is locked.

If you attempt to remove a required field, such as **Fund**, from the **Data entry fields** box, you receive a message that indicates you cannot remove a required field from the batch.



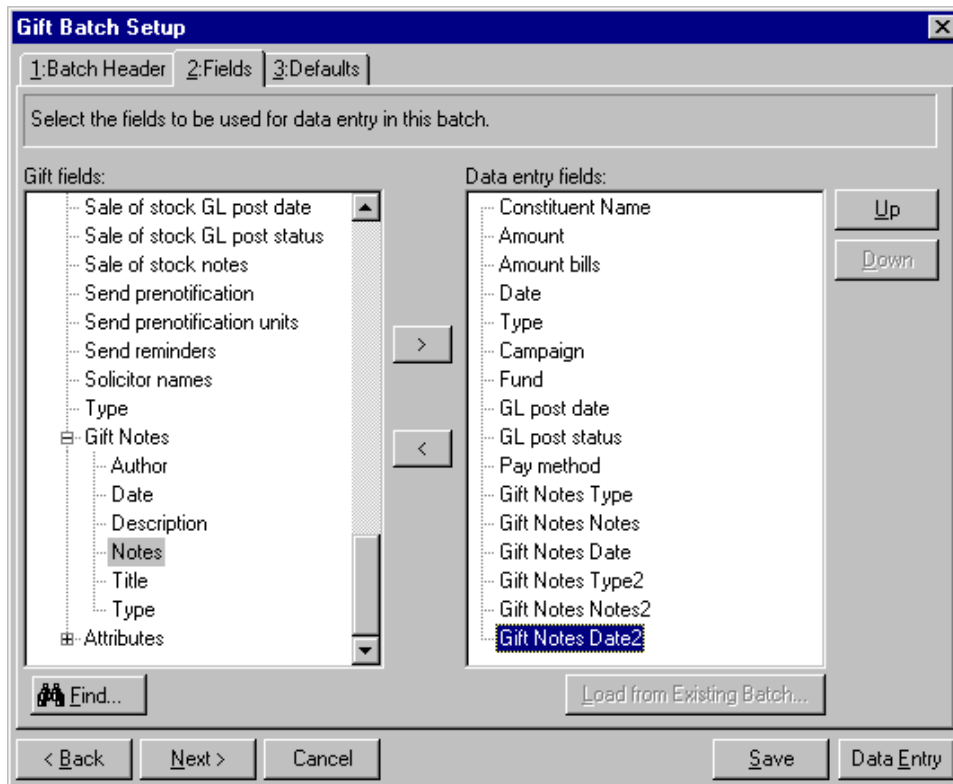
Selecting Fields for a Gift Batch

Warning: If you create a gift batch and hide the **Fund** field, when you create a gift with a fund to which solicitors are associated, solicitors do not default on the gift. However, when the **Fund** field is not hidden on a gift batch, the solicitor information defaults appropriately.

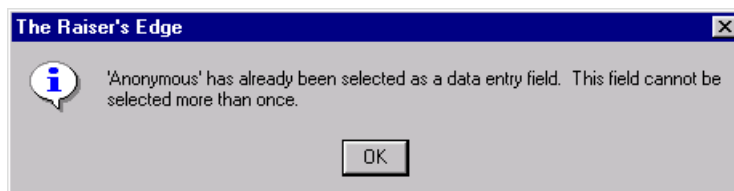
To include a field in a gift batch, select the field in the **Gift fields** box and click the right arrow to move the field to the **Data entry fields** box. For example, to include the **Acknowledge** field, highlight **Acknowledge** in the **Gift fields** box and click the right arrow to move it to the **Data entry fields** box. The order you list the fields in the **Data entry fields** box is the order the fields appear on the Data Entry screen. To change the order of the fields, select a field in the **Data entry fields** box and click the **Up** or **Down** button to move the field to the appropriate location.

On occasion, you may need to enter multiple entries for a field on a gift record. For example, you may need to enter several notes about the gift on the Miscellaneous tab. To enter multiple notes for a gift, you must include the **Notes** field in the batch more than once. For example, to enter two notes for each gift, you need to include the **Notes** field twice in the batch.

Because you can include many fields in a batch more than once, fields do not disappear from the **Gift fields** box when you include them in the batch. The first time you include a field, the field name appears in the **Data entry fields** box as usual. When you include the field again, the field name and selection number appear in the **Data entry fields** box. For example, the first time you select the **Notes** field, **Gift Notes Type**, **Gift Notes Notes**, and **Gift Notes Date** appear in the **Data entry fields** box. The second time you include the **Notes** field in the **Data entry fields** box, **Gift Notes Type 2**, **Gift Notes Notes 2**, and **Gift Notes Date 2** appear in the **Data entry fields** box.



Some fields cannot be included in a batch more than once. For example, if you include the **Anonymous** field in the batch and attempt to include the **Anonymous** field again, you receive a message that indicates the field is already in the batch.



When you select certain fields for a batch, other fields automatically appear in the **Data entry fields** box. For example, when you select the **Check number** field, the **Pay method** field automatically appears in the **Data entry fields** box because you must select a **Pay method** of Personal Check or Business Check before you can enter the **Check number**.

Creating a Batch Template by Loading Fields from an Existing Batch

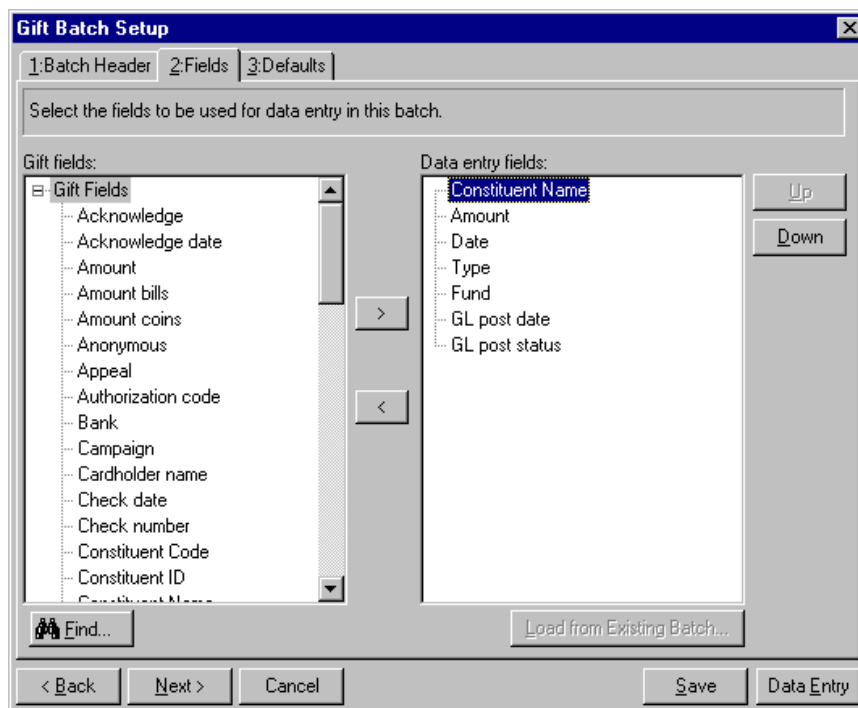
After you select the **Data entry fields** for a batch and save the batch, you can copy the field list to use as a template when you create a new batch. When you copy a field list to a new batch, you basically use a template of fields to create your new batch. In your new batch, you can also add additional fields and remove unnecessary fields as needed. To copy a field list from another batch, click the **Load from Existing Batch** button on the Fields tab of the Gift Batch Setup screen. This feature saves you time because you do not need to re-create a field list you already use in another batch. You basically create a template for your new batch based on an existing batch. When you load fields from another batch, the program replaces any fields in the **Data entry fields** box with the fields selected in the existing batch. When you click this button, the Open screen for batches appears so you can search for the existing batch from which to copy fields.

► Creating a Batch Template by Loading fields from an existing batch

When you load fields from another batch, the program replaces any fields in the **Data entry fields** box with the fields from the selected batch.

Note: To access the Gift Batch Setup screen from the Data Entry screen, select **Tools, Edit Batch Setup** from the menu bar. To access the Gift Batch Setup screen for a new batch, click **New Gift Batch** on the Batch page.

1. From the Gift Batch Setup screen, select the Fields tab.



Warning: If you already entered gifts into the batch, **Load from Existing Batch** is disabled.

2. Click **Load from Existing Batch**. The Open screen appears so you can search for the batch to use to create your new batch template.

The screenshot shows a window titled "Open" with a search bar at the top containing the text "Batch". Below the search bar is a table with the following data:

Batch Number	Batch Description	Batch Type	Date Added	
21	All recurring gifts due as of 1/1/2005	Gift	06/06/2005	Sup
28	10 gifts of \$100 - 10/03/2005	Gift	10/03/2005	Sup
33		Gift	09/06/2005	Sup
37		Gift	09/06/2005	Sup
38	Gifts received for the 2005 Annual Fund on ...	Gift	09/09/2005	Sup

Below the table are several search criteria fields and buttons:

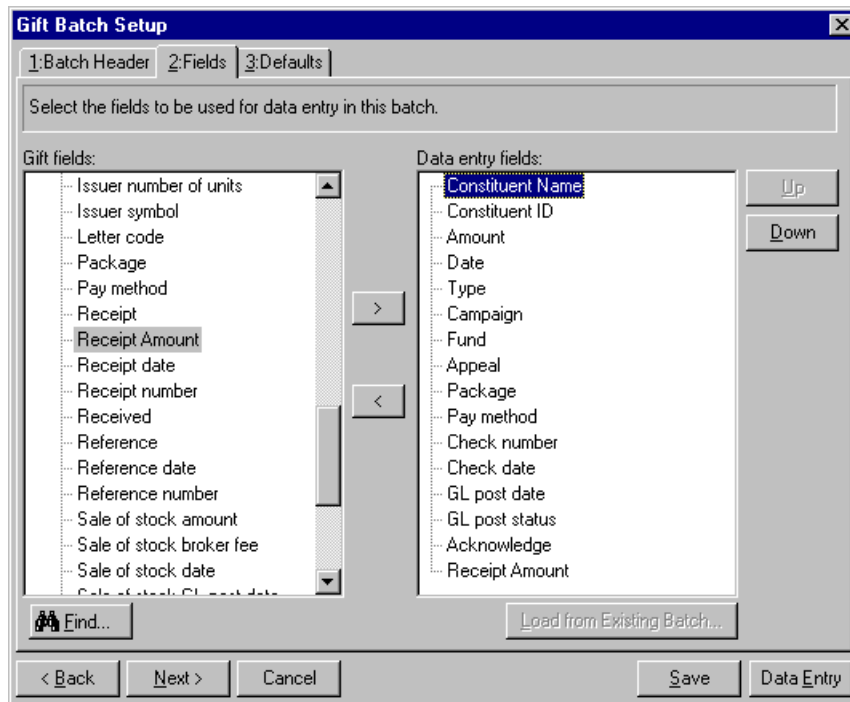
- Buttons: "Open", "Cancel", "Options", "Find Now", "New Search", "Previous Search", "Expand Results".
- Find Batches that meet these criteria:
 - Batch number: [dropdown]
 - Batch description: [dropdown]
 - Batch type: [dropdown] (set to "Gift")
 - Created on: [date field]
 - Created by: [dropdown]
 - Last committed on: [date field]
 - ☐ Exact match only
 - ☐ Display recurring batches
 - ☐ Display only open batches
 - ☐ Include for bank deposit?

Note: In the **Find Batches that meet these criteria** frame, you can enter the first few letters or characters in the criteria fields if you do not know the correct spelling or number. For detailed information about how to use these fields, see the *Program Basics Guide*.

3. On the Open screen for batches, enter information in the criteria fields at the bottom of the screen to help narrow the search, and click **Find Now**.
4. When you locate the batch from which you want to create a template, select the batch in the grid.

Warning: We recommend you search by one or two of the most helpful criteria types, because the results that appear in the grid must match all the criteria you enter. If you add too much criteria information in the **Find Batches that meet these criteria** fields, it can actually prevent you from finding the gift.

5. Click **Open**. You return to the Fields tab of the Gift Batch Setup screen. The program copies the field list from the batch you select to the **Data entry fields** box and therefore gives you a template to work with so you do not have to remember which fields to add when you work with new batches.



6. You can add or remove fields from the **Data entry fields** box, as necessary.
7. To begin to add gifts to the batch, click **Data Entry**. For more information about the Data Entry screen, see "Gift Batch Data Entry" on page 125.

Defaults Tab

Defaults are guidelines you can set up to simplify data entry. For example, if you add only cash gifts in a batch, you can set the default for the **Type** field to Cash. Every time you add a new gift to the batch, the program enters Cash in the **Type** field. This saves time because you do not have to select an entry for the **Type** field for each gift to add to the batch. After the program enters a default in a field, you can select the text and type over it with the correct entry to change the default entry. If you decide to add a Gift-in-Kind to the batch, you can change the default entry of Cash to Gift-in-Kind.

On the Defaults tab, you can select a default for many of the fields you include in the batch. If you do not want to specify a default value, you can leave any or all fields on this tab blank. The Defaults tab is divided into four screens: General, Split Gift, Schedule, and Honor/Memorial. Click the name of the screen in the box on the left side of the screen to enter defaults for that topic.

Defaults Tab: General

Note: Honor/Memorial options are only available if you use the optional module *Honor/Memorial Tracking*.

The General grid displays all the fields you select on the Fields tab to appear in the batch.

Gift Batch Setup

1:Batch Header | 2:Fields | 3:Defaults

You can enter a value in any of the fields below to create a default value for that field.

General

Field	Default Value	Hide?
Constituent Name		<input type="checkbox"/>
Amount	\$500.00	<input type="checkbox"/>
Date	10/05/2005	<input type="checkbox"/>
Type	Cash	<input checked="" type="checkbox"/>
Fund	2005 Annual Fund	<input type="checkbox"/>
GL post date		<input type="checkbox"/>
GL post status	Not Posted	<input type="checkbox"/>
Pay method		<input type="checkbox"/>

Note that the default value for fields that are hidden will be added to each gift in the batch.

< Back | Next > | Cancel | Save | Data Entry

Adding a Default

Warning: If a single batch is open on more than one workstation, you can change the defaults but not the order the fields list in the batch.

The Defaults grid displays the fields you select on the Fields tab of the Gift Batch Setup screen. To add a default, enter the field entry in the **Default Value** column like you can on a gift record. If one field depends on another, you cannot enter a default for the dependent field until you enter a default for the independent field. For example, you cannot select a default for the **Check date** field until you select a default of Personal Check or Business check for the **Pay method** field.

You cannot enter defaults for the **Spouse**, **Date 1st Pay**, or **Constituent Code** fields. To enter a default for the **Date 1st Pay** field, you can do so on the Schedule screen. Also, you cannot add defaults for benefit and soft credit information. Benefit defaults are based on the appeal, membership, or event associated with each gift.

Warning: You cannot hide the **Constituent Name** field because your entry in this field is different for each gift you enter in the batch.

The order the fields appear on this screen is the order they appear on the Data Entry screen. To change the order, highlight the field to move and click the **Up** or **Down** button to relocate the field. When you change the field order in the Defaults grid, the order updates in the **Data entry fields** box on the Fields tab.

Hiding a Field

Warning: If you create a gift batch and hide the **Fund** field, when you create a gift with a fund to which solicitors are associated, solicitors do not default on the gift. However, when the **Fund** field is not hidden on a gift batch, the solicitor information defaults appropriately.

To add information for a field on a gift record, you must include the field in the batch. If you enter the same information in a particular field for each gift in a batch, you may want to add a default and hide the field to reduce the number of fields that appear in the Data Entry grid. For example, you enter gifts in a batch that has **Include batch for bank depositing** marked on the Batch Header tab. Because this checkbox is marked, when you tab through to a new gift row in the batch, “Cash” defaults into the **Type** field. You can select to hide this field because this entry is the same for all gifts entered in this batch.

To hide a field, mark **Hide?** on the Defaults tab of the Gift Batch Setup screen. From the Data Entry screen, you can select **View, Hide/Show Columns** from the menu bar to display the hidden columns. For more information about how to display hidden columns, see “Viewing hidden columns in a batch” on page 148.

Defaults Tab: Split Gift

In a gift batch, you can add defaults to split a gift between multiple campaigns, funds, appeals, or packages. This Split Gift grid works the same as the grid on the Split Gift tab in a gift record, except gifts can be split only by percentages. The split gift information you enter on the Split Gift screen automatically defaults for each gift in the batch.

Note: If you set a default gift amount but do not enter percentages when you split a gift, the gift splits evenly. For example, if you set a default gift amount and then split a gift between two funds but do not enter a percentage for either split, each fund receives 50% of the gift amount. If you do not set a default gift amount and do not enter percentages when you split a gift, the first split receives 100% of the gift amount.

You do not need to enter complete information in the Split Gift grid. If the information is not complete, the Split Gift screen automatically appears when you complete a row on the Data Entry screen.

The screenshot shows the 'Gift Batch Setup' dialog box with the 'Defaults' tab selected. The 'Split Gift' section is active, showing a grid for splitting gifts by Campaign, Fund, Appeal, Package, and Percent. The grid contains two rows of data. A 'Distribute Evenly' button is located at the bottom right of the grid. The bottom of the dialog box has navigation buttons: '< Back', 'Next >', 'Cancel', 'Save', and 'Data Entry'.

	Campaign	Fund	Appeal	Package	Percent
	Capital Campaign	Acquisition...	Annual Newsletter		50.000
	Capital Campaign	Building Fund	Annual Newsletter		50.000

► Setting defaults to split a gift between two funds

Although this procedure explains how to set defaults to split a gift between two funds, you can use these principles to set split gift defaults for multiple campaigns, appeals, and packages. The methods are the same.

Scenario: In your recent Newsletter appeal, you ask for donations to your Acquisition and Building funds in your Capital campaign. You receive many gifts that should be split evenly between these two funds. To simplify data entry, you can set up defaults for the campaign, fund, appeal, and package distribution for all gifts in the batch.

1. From the Gift Batch Setup screen, select the Defaults tab.

Note: To access the Gift Batch Setup screen from the Data Entry screen, select **Tools, Edit Batch Setup** from the menu bar. To access the Gift Batch Setup screen for a new batch, click **New Gift Batch** on the Batch page.

2. From the box on the left side of the Gift Batch Setup screen, select **Split Gift**.

The screenshot shows the 'Gift Batch Setup' window with the 'Defaults' tab selected. On the left, a tree view shows 'General', 'Split Gift' (selected), 'Schedule', and 'Honor/Memorial'. The main area is titled 'Split Gift' and contains the text: 'The information entered below will automatically be associated with every gift entered in this batch.' Below this is a table with columns: Campaign, Fund, Appeal, Package, and Percent. The first row is highlighted in yellow. At the bottom right of the table area is a button labeled 'Distribute Evenly'. At the bottom of the window are buttons for '< Back', 'Next >', 'Cancel', 'Save', and 'Data Entry'.

Campaign	Fund	Appeal	Package	Percent

Note: To enter information in the **Campaign**, **Fund**, **Appeal**, and **Package** columns, type the entry in the field, click the arrow to select an entry from the list, or click the binoculars to search for the entry.

3. In the first row of the **Campaign** column, select "Capital Campaign".
4. In the first row of the **Fund** column, select "Acquisition Fund".
5. In the first row of the **Appeal** column, select "Newsletter".
6. In the first row of the **Package** column, select the package to associate with the gift. For this example, the appeal has not been divided into packages so you can leave the **Package** column blank. Packages are a way of further defining the appeal. For example, you may send a color newsletter to major donors and a black and white newsletter to prospective donors.
7. In the **Percent** column, enter "50" to distribute 50% of the gift to the Acquisition fund.
8. To begin the second row in the Split Gift grid, tab through the remaining fields.

9. In the second row of the **Campaign** column, select “Capital Campaign”. It is necessary to enter the Capital campaign on the second row so it is credited with 100% of the gift amount.
10. In the second row of the **Fund** column, select “Building Fund”.

Warning: If you do not enter the Capital campaign and the Newsletter appeal again in the second row, the Capital campaign and the Newsletter appeal are credited with only 50% of the gift because that is the distribution you designated in the first row of the Split Gift grid.

11. In the second row of the **Appeal** column, select “Newsletter”. It is necessary to enter the Newsletter appeal on the second row so it is credited with 100% of the gift amount.

The screenshot shows the 'Gift Batch Setup' dialog box with the 'Split Gift' tab selected. The 'General' tab is also visible in the left sidebar. The main area contains a table for defining gift splits. The table has five columns: Campaign, Fund, Appeal, Package, and Percent. The first row shows 'Capital Campaign' for Campaign, 'Acquisition...' for Fund, 'Annual Newsletter' for Appeal, and '50.000' for Percent. The second row shows 'Capital Campaign' for Campaign, 'Building Fund' for Fund, and 'Annual Newsletter' for Appeal. The 'Package' column is empty for both rows. Below the table is a 'Distribute Evenly' button. At the bottom of the dialog are buttons for '< Back', 'Next >', 'Cancel', 'Save', and 'Data Entry'.

Campaign	Fund	Appeal	Package	Percent
Capital Campaign	Acquisition...	Annual Newsletter		50.000
Capital Campaign	Building Fund	Annual Newsletter		

Tip: If you click **Distribute Evenly**, you do not need to enter any numbers in the **Percent** column. Simply tab through the **Percent** column and enter the name of the next campaign in the second row of the **Campaign** column.

12. To automatically divide the gift amount evenly between the funds you select, click **Distribute Evenly**. If you do not want to distribute the gift evenly, enter a specific distribution in the **Percent** column.

The screenshot shows the "Gift Batch Setup" dialog box with the "Split Gift" tab selected. The left sidebar lists "General", "Split Gift", "Schedule", and "Honor/Memorial". The main area contains a text box with the instruction: "You can enter a value in any of the fields below to create a default value for that field." Below this is a table with the following data:

	Campaign	Fund	Appeal	Package	Percent
<input type="checkbox"/>	Capital Campaign	Acquisition...	Annual Newsletter		50.000
<input type="checkbox"/>	Capital Campaign	Building Fund	Annual Newsletter		50.000

Below the table is a large empty text area. At the bottom right of the main area is a button labeled "Distribute Evenly". The bottom of the dialog box has navigation buttons: "< Back", "Next >", "Cancel", "Save", and "Data Entry".

13. You can add more defaults for the batch, as necessary. To begin to enter data in the batch, click **Data Entry**. For more information about the Data Entry screen, see "Gift Batch Data Entry" on page 125.

Defaults Tab: Schedule

On the Schedule screen, you can enter scheduling information that defaults for each pledge and recurring gift entered in the batch. For example, if you enter pledges with the same payment schedule in a batch, you can set up a default payment schedule so you do not need to define a schedule for every pledge entered in the batch.

The screenshot shows the 'Gift Batch Setup' dialog box with the 'Defaults' tab selected. The 'Schedule' section is active, showing the following fields and values:

- Gift Amount:** <No default gift amount specified>
- Frequency:** Quarterly (dropdown)
- No. Installments:** 4 (text box)
- Based on:** <Specific date> (dropdown)
- Day:** 1 (text box) of every three months (radio button selected)
- The:** (dropdown) of every three months (radio button unselected)
- Starting on:** <Specific date> (dropdown) 9/09/2005 (calendar icon)
- Installments due on the 1st day of every three months beginning on:** 09/09/2005

At the bottom of the dialog box, there are buttons for '< Back', 'Next >', 'Cancel', 'Save', and 'Data Entry'.

Gift Amount. The **Gift Amount** display shows the default gift amount selected on the General screen of the Defaults tab. If you did not specify a default gift amount, <No default gift amount entered> appears. For recurring gifts, the default **Gift Amount** represents the default transaction amount. For example, if a constituent gives a recurring gift of \$20 each month, the **Gift Amount** displays \$20. For pledges, the default **Gift Amount** represents the total amount of the gift. When you set up the installment schedule for pledges, this amount divides into installments based on the **Frequency** and **No. Installments** fields.

Note: At the bottom of the Gift Batch Setup screen, a message appears and describes the installment schedule you define.

Frequency. In the **Frequency** field, select the default frequency for pledges and recurring gifts entered in the batch. You can select from the following frequencies:

- Annually (once a year)
- Semi-Annually (twice a year)
- Quarterly (four times a year)
- Bimonthly (every two months)
- Monthly (once a month)
- Semi-monthly (twice a month)
- Biweekly (every two weeks)
- Weekly (once a week)
- Single Installment (one payment)
- Irregular (a payment that does not fit into any other category)

Based on. The **Based on** field determines when payments are due. You can base the payment schedule on the gift date, the date you enter the gift in *The Raiser's Edge*, or a specific date of your choice.

If you select Gift Date, the schedule begins on the Gift Date, and the remaining installments are scheduled for subsequent anniversaries of the Gift Date based on the frequency you select.

Note: When you select Semi-Monthly in the **Frequency** field., the **Based on** field is disabled.

When you select Entry Date, the schedule begins on the Entry Date, and remaining installments are scheduled for subsequent anniversaries of the Entry Date based on the frequency you select.

Note: Installments with a frequency of weekly or biweekly can be due on multiple days of the week. For example, you can set up a default weekly installment schedule with installments due every Tuesday and Thursday.

If you select <Specific Date>, the schedule begins on the specific date you enter. Remaining installments are scheduled for subsequent anniversaries of this date based on the frequency you select. When you select <Specific Date> in the **Based on** field, the program enables the **Starting on** field so you can determine when the first payment is due. In the **Starting on** field, you can select Gift Date, Entry Date, or <Specific Date>. The remainder of the installments are due based on the schedule you define for the gift with the **Frequency** and **Based on** fields.

No. Installments. The **No. Installments** field determines the length of the installment schedule. The program interprets this field differently depending on the type of gift you enter. For a pledge gift, enter the number of payments the constituent plans to make. The program divides the gift amount into installments based on this number. For example, if a constituent plans to pay a pledge in one year with monthly installments, enter “12” in the **No. Installments** field.

Note: When you select Biweekly or Weekly in the **Frequency** field, the <Specific Date> option in the **Based on** field changes to <Specific day(s) of the week>.

When you set defaults for recurring gifts, enter the number of transactions for the recurring gift. For example, if the constituent makes bi-monthly payments of \$15 through a payroll deduction plan for the next two years, enter “12” in this field because this is the number of payments the constituent will make to your organization. If you leave the **No. Installments** field blank, the gift is considered open-ended. For an open-ended gift, your organization receives the gift amount every time a transaction is committed.

Defaults Tab: Honor/Memorial

If you use the optional module *Honor/Memorial Tracking*, the Honor/Memorial screen is available. On the Honor/Memorial screen, you can set up a default tribute to which all gifts you enter in the batch are designated.

The screenshot shows the 'Gift Batch Setup' dialog box with the 'Defaults' tab selected. The 'Honor/Memorial' section is active, showing a table for setting default values for various fields. The 'Honor/Memorial' row is highlighted, with 'Urban, Ms. Cynthia Beth' entered in the 'Default Value' column. The 'Tribute' row is also highlighted, with 'In Honor Of' entered. The 'Tribute type' row is highlighted, with 'to celebrate the birthday of' entered. The 'Acknowledge' row is highlighted, with 'Not Acknowledged' entered. Below this is a table for 'Ackn?' with columns for 'Name', 'Relationship', 'Reciprocal', and 'Letter'. The first row in this table is highlighted, with 'Urban, Ms. Cynthi...' in the 'Name' column, 'self' in the 'Relationship' column, 'self' in the 'Reciprocal' column, and an empty 'Letter' column. The 'Ackn?' checkbox is checked.

Field	Default Value
Honor/Memorial	Urban, Ms. Cynthia Beth
Tribute	In Honor Of
Tribute type	to celebrate the birthday of
Acknowledge	Not Acknowledged

Ackn?	Name	Relationship	Reciprocal	Letter
<input checked="" type="checkbox"/>	Urban, Ms. Cynthi...	self	self	

Selecting the Default Honor/Memorial and Tribute

In the **Honor/Memorial** row of the **Field** column, select the default Honor/Memorial constituent to whom you want to designate the gifts entered in the batch. For example, if you plan to receive gifts in celebration of Cynthia Urban's birthday, enter Cynthia Urban in the **Default Value** column in the **Honor/Memorial** row.

After you select a **Default Value** for the **Honor/Memorial** row, you can select a default **Tribute** and **Tribute type** for gifts donated to this honor/memorial. For more information about these fields, see the *Tribute Gifts Guide*. In the **Acknowledge** row, select whether to notify the relations listed in the Acknowledgees grid of gifts donated to this tribute. You can select Acknowledged, Not Acknowledged, or Do not Acknowledge.

Acknowledgees

Note: If the default tribute you select does not have **Gifts may be given to this tribute** marked on the tribute record, you receive a warning that alerts you that gifts cannot be given to the default tribute.

In the Acknowledgees grid at the bottom of the Gift Batch Setup screen, enter all the relationships of the honor/memorial constituent who should be notified when gifts are donated to this tribute. In the **Ackn?** column, mark the checkbox for every acknowledgee to receive a notification letter. For more information about how to add acknowledgees for a tribute, see the *Tribute Data Entry Guide*.

Setting Up a New Gift Batch

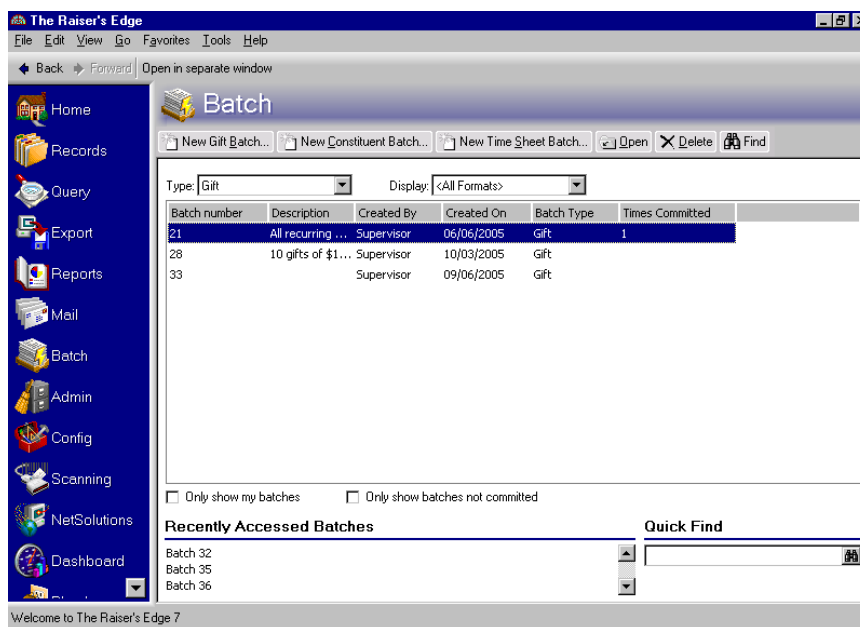
Now that you understand the features and options on the Gift Batch Setup screen, you can set up a batch to add new gifts to your database.

► Setting up a new gift batch

Scenario: In response to your Direct Mailing appeal for your 2005 Annual Fund, you receive five cash gifts that total \$600 and two pledge gifts that total \$300. For these gifts, you want to record the constituent name and ID; gift amount, date, and type; campaign, fund, appeal, and package to which the gifts should be attributed; pay method; check number and date, post status and date, acknowledgement status, and receipt amount.

Note: If you want the **Receipt amt** field to automatically include the amount in the gift **Amount** field, you must set this up as a rule in **Business Rules** in *Configuration*. From the **Gift options** in Business Rules, mark **When changing 'gift amount' automatically update Receipt amount**. For more information about Business Rules, see the *Configuration & Security Guide*.

1. On the Raiser's Edge bar, click **Batch**. The Batch page appears.



Warning: If you do not have security rights to create a gift batch, the **New Gift Batch** link is disabled.

- Click **New Gift Batch** at the top of the page. The Batch Header tab of the Gift Batch Setup screen appears.

Gift Batch Setup

1:Batch Header | 2:Fields | 3:Defaults

Batch Statistics			
Running number of gifts:	0	Number of matching gifts:	
Running amount:	\$0.00	Matching gift amount:	\$0.
Created on:	09/09/2005 11:31:04...	Times committed:	
Last changed on:		Last committed on:	

Batch number: 38

Projected number of gifts:

Projected amount:

Automatically Display:

Description:

☐ Batch is recurring

☐ Include batch for bank depositing

☒ Other users may access this batch

Press F7 to zoom

< Back Next > Cancel Save Data Entry

- In the **Batch number** field, the program defaults the next available batch number. For this example, you do not need to change the default batch number.

Note: The program formats the batch number in accordance with the settings you select on the Business Rules page in *Configuration*. For more information about how to define the format for batch numbers, see “Business Rules” on page 89.

- In the **Projected number of gifts** field, enter “7”. This is the total number of gifts you plan to enter in this batch.
- In the **Projected amount** field, enter the amount \$900. This is the total amount of gifts you plan to enter in this batch.
- Do not select an entry in the **Automatically Display** field because this batch will not contain any gifts that should be linked to a membership, event, proposal, or honor/memorial.
- In the **Description** field, enter “Gifts received for the 2005 Annual Fund on 09/09/2005”. The description explains why you add the gifts to this batch.
- Do not mark **Batch is recurring** because this batch contains single cash gifts and pledges and should be committed to the database only once.
- Do not mark **Include batch for bank depositing** because you want to include pledge gifts in this batch.

10. Mark **Other users may access this batch**. This batch does not contain sensitive information, so it is not necessary to limit access to the user who creates the batch.

The screenshot shows the 'Gift Batch Setup' dialog box with the '1: Batch Header' tab selected. The 'Batch Statistics' section displays the following data:

Running number of gifts:	0	Number of matching gifts:	
Running amount:	\$0.00	Matching gift amount:	\$0.
Created on:	09/09/2005 11:31:04...	Times committed:	
Last changed on:		Last committed on:	

Below the statistics, the 'Batch number' is 38, 'Projected number of gifts' is 7, and 'Projected amount' is \$900.00. The 'Automatically Display' dropdown is set to 'All'. The 'Description' field contains 'Gifts received for the 2005 Annual Fund on 09/09/2005'. The 'Batch is recurring' checkbox is unchecked, 'Include batch for bank depositing' is unchecked, and 'Other users may access this batch' is checked. The 'History' button is visible. At the bottom, there are buttons for '< Back', 'Next >', 'Cancel', 'Save', and 'Data Entry'.

Note: To quickly locate fields in the **Gift fields** box, you can use the **Find** button.

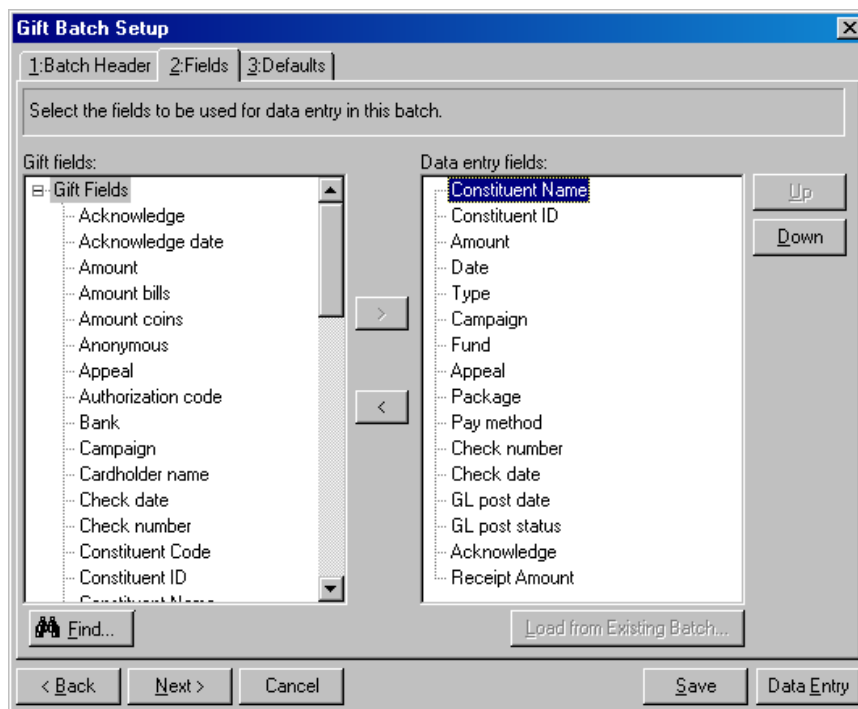
11. Click **Next** at the bottom of the screen to display the Fields tab. The **Constituent Name, Amount, Date, Type, Fund, GL post date, and GL post status** fields automatically appear in the **Data entry fields** box because they are required fields for gift batches.

The screenshot shows the 'Gift Batch Setup' dialog box with the '2: Fields' tab selected. The instruction 'Select the fields to be used for data entry in this batch.' is displayed. The 'Gift fields' list on the left contains 'Gift Fields'. The 'Data entry fields' list on the right contains the following fields: 'Constituent Name', 'Amount', 'Date', 'Type', 'Fund', 'GL post date', and 'GL post status'. There are 'Up' and 'Down' buttons to the right of the 'Data entry fields' list. At the bottom, there are buttons for '< Back', 'Next >', 'Cancel', 'Save', and 'Data Entry'. A 'Find...' button is located at the bottom left, and a 'Load from Existing Batch...' button is at the bottom right.

12. In the **Gift fields** box, click the plus sign next to **Gift Fields** to view all the fields in this category.
13. Select the **Campaign** field in the **Gift fields** box and click the right arrow to move the field to the **Data entry fields** box. The **Campaign** field moves to the bottom of the list in the **Data entry fields** box.

Note: When you select **Check Date**, the program automatically moves the **Pay method** field to the **Data entry fields** box because the **Check Date** field depends on your entry in the **Pay method** field.

14. Use the same selection method to include the following fields in this gift batch: **Constituent ID**, **Acknowledge**, **Appeal**, **Package**, **Check date**, **Check number**, **Pay method**, and **Receipt Amount**.
15. In the **Data entry fields** box, to move the **Campaign** field above the **Fund** field, select the **Campaign** field and click the **Up** button until the **Campaign** field appears above the **Fund** field. The order you arrange the fields in the **Data entry fields** box is the order the fields appear on the Data Entry screen for the gift batch.
16. Use the **Up** and **Down** buttons to order the fields as shown in the **Data entry fields** box below.



Note: You can use shortcut keys to move around *The Raiser's Edge* without the use of your mouse. For example, press **ALT + 2** on your keyboard to select the Fields tab, or **ALT + 3** to select the Defaults tab.

17. Click **Next** at the bottom of the screen to display the General screen on the Defaults tab. The grid on the General screen displays all the fields you selected on the Fields tab.

Gift Batch Setup

1:Batch Header | 2:Fields | 3:Defaults

You can enter a value in any of the fields below to create a default value for that field.

General

Field	Default Value	Hide?
Constituent Name		<input type="checkbox"/>
Constituent ID		<input type="checkbox"/>
Amount		<input type="checkbox"/>
Date		<input type="checkbox"/>
Type		<input type="checkbox"/>
Campaign		<input type="checkbox"/>
Fund		<input type="checkbox"/>
Appeal		<input type="checkbox"/>
Package		<input type="checkbox"/>
Pay method		<input type="checkbox"/>

Note that the default value for fields that are hidden will be added to each gift in the batch.

< Back | Next > | Cancel | Save | Data Entry

18. Because the **Campaign**, **Fund**, **Appeal**, and **Package** are the same for each gift you enter in this batch, add defaults for these fields. In the **Default Value** column, select "Annual Campaign" for the **Campaign** field, "2005 Annual Fund" for the **Fund** field, and "Direct Mailing" for the **Appeal** field.

Warning: Only hide a field if you enter a default and do not expect the value of this default to change for any gift you enter in the batch.

19. In the **Hide?** column, mark the checkbox that corresponds to the **Campaign**, **Fund**, and **Appeal** fields. When you hide a field, the program does not display the field on the Data Entry screen for the batch.

Gift Batch Setup

1: Batch Header | 2: Fields | 3: Defaults

You can enter a value in any of the fields below to create a default value for that field.

General

Field	Default Value	Hide?
Constituent Name		<input type="checkbox"/>
Constituent ID		<input type="checkbox"/>
Amount		<input type="checkbox"/>
Date		<input type="checkbox"/>
Type		<input type="checkbox"/>
Campaign	Annual Campaign	<input checked="" type="checkbox"/>
Fund	2005 Annual Fund	<input checked="" type="checkbox"/>
Appeal	Direct Mailing	<input checked="" type="checkbox"/>
Package		<input type="checkbox"/>
Pay method		<input type="checkbox"/>

Note that the default value for fields that are hidden will be added to each gift in the batch.

< Back | Next > | Cancel | Save | Data Entry

Note: Because the pledges you enter in this batch have different installment schedules, do not set defaults on the Schedule screen.

20. To save the information entered on the Gift Batch Setup screen and display the Data Entry screen for this gift batch, click **Data Entry**. For more information about how to add gifts to the batch, see “Gift Batch Data Entry” on page 125.

Gift Batch Data Entry

After you select the fields and defaults to use for your batch on the Gift Batch Setup screen, click **Data Entry**. The Data Entry screen appears for the gift batch.

Constituent Name	Constituent ID	Amount	Date	Type	Pay method
*					
Julie Bach	6	\$50.00	07/01/2005	Cash	Personal Chec
Kenneth Parker	125	\$120.00	07/01/2005	Pledge	Personal Chec
Carter Pharmaceuticals, Inc.	138	\$200.00	07/01/2005	Cash	Business Chec
Lorrel Justin	40	\$75.00	07/01/2005	Cash	Personal Chec
David Murphy	51	\$150.00	07/01/2005	Cash	Personal Chec
Renee Wilson	129	\$180.00	07/01/2005	Pledge	
Cam Phan	94	\$125.00	07/01/2005	Cash	Personal Chec

Ready. Gift 7 of 8 Running Total: \$900.00

There are four main areas on the Data Entry screen: the Default Row, Data Entry grid, Constituent Window, and Status bar.

Default Row

Note: To easily differentiate the Default Row from the other rows in the Data Entry grid, we strongly recommend you display the Default Row in a different color than the Data Entry grid.

When displayed, the Default Row is the first row in the Data Entry grid and contains the default values you select on the Defaults tab of the Gift Batch Setup screen. When you add gifts to the batch, any information entered in the Default Row can appear as a default for each new gift in the batch. In User Options, you can display or hide the Default Row, choose a color in which to display this row, and select how to add the defaults for each gift.

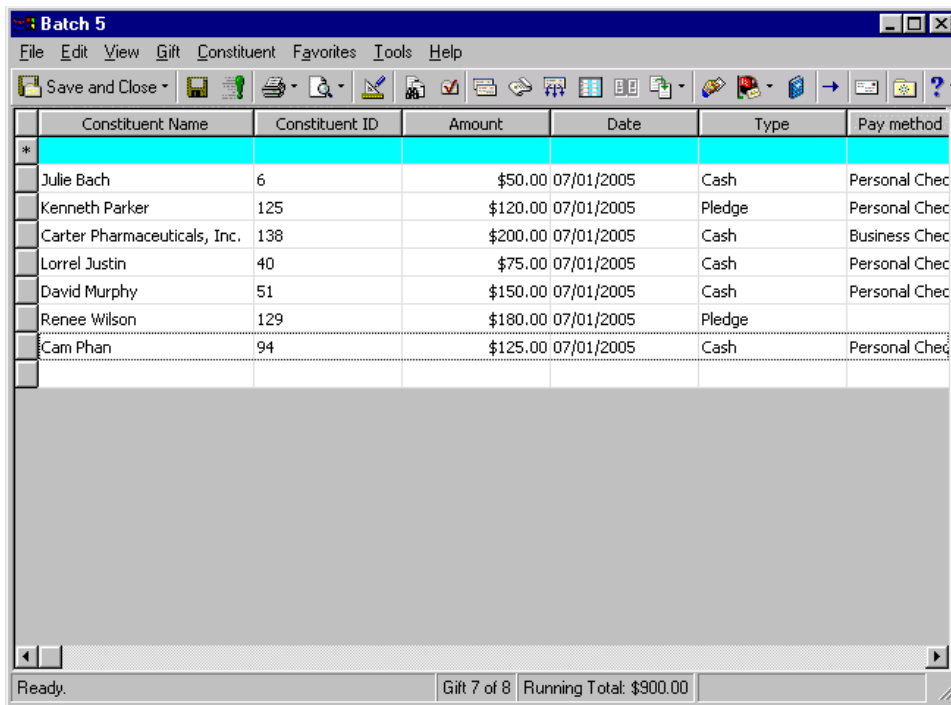
Before you begin to enter data in a gift batch, you must select in User Options how to enter defaults in the batch. There are three ways to enter defaults in the batch. You can press **F2** when in a field to add the default for that field, insert a default when you select a field, or insert all available defaults when you begin a new row in the batch. The Default Row is a tool to easily view and change the defaults.

Note: Regardless of whether you choose to use defaults, the current system date defaults in the **GL post date** and **Date** fields, Not Acknowledged defaults in the **Acknowledge** field, Not Receipted defaults in the **Receipt** field, and Cash defaults in the **Pay method** field when you do not choose defaults for these fields.

When you display the Default Row, you can type over the default you want to change in the Default Row to change the defaults. When you change values in the Default Row, the changes update on the Defaults tab of the Gift Batch Setup screen. If you change an entry in the Default Row after you enter gifts in the batch, the new default settings affect the gifts entered after you make the change. The new default settings do not affect gifts already in the batch. For more information about how to display the default row, see “User Options” on page 83.

Data Entry Grid

In the Data Entry grid, each row of the spreadsheet that contains information becomes a gift record when you commit the batch to the database.



	Constituent Name	Constituent ID	Amount	Date	Type	Pay method
*						
	Julie Bach	6	\$50.00	07/01/2005	Cash	Personal Chec
	Kenneth Parker	125	\$120.00	07/01/2005	Pledge	Personal Chec
	Carter Pharmaceuticals, Inc.	138	\$200.00	07/01/2005	Cash	Business Chec
	Lorrel Justin	40	\$75.00	07/01/2005	Cash	Personal Chec
	David Murphy	51	\$150.00	07/01/2005	Cash	Personal Chec
	Renee Wilson	129	\$180.00	07/01/2005	Pledge	
	Cam Phan	94	\$125.00	07/01/2005	Cash	Personal Chec

Ready. Gift 7 of 8 Running Total: \$900.00

When you set up a gift batch, you define the columns that appear in the Data Entry screen from the Fields tab of the Gift Batch Setup screen. The columns list in the order you select on the Fields tab. For more information about the Fields tab, see “Fields Tab” on page 105.

When a column is not applicable to the gift you enter, the field is locked and appears in the color you select in the **Locked cell color** field on the Color tab of User Options. For example, Stock fields are not applicable to a cash gift paid with a personal check. Any Stock fields are locked and appear in the color you select for a locked cell.

Constituent Window

Note: To easily move back and forth between the Data Entry grid and the Constituent Window, press **F8** on your keyboard.

When you add gifts in a batch, you may discover a donor who is not a constituent in your database. You can use the Constituent Window to create a new constituent record for the donor or edit information on a donor's existing constituent record. When you display the Constituent Window, the program displays information about the constituent for whom you add a gift.

The screenshot shows a software window titled "Batch 38" with a menu bar (File, Edit, View, Gift, Constituent, Favorites, Tools, Help) and a toolbar. The main area is divided into two panes. The left pane displays a table of gift entries:

Constituent Name	Constituent ID	Amount	Date	Type	
Bach, Julie	6	\$50.00	09/09/2005	Cash	Ann...
Adamson, Mark	3	\$100.00	09/09/2005	Pledge	Plann...
Davenport, Sean	15	\$25.00	09/09/2005	Pledge	Ann...
Kessler, Marilyn	44	\$50.00	09/09/2005	Pledge	Ann...

The right pane shows a detailed view of a constituent with the following fields and values:

Field	Value
Title 1	Ms.
First Name	Julie
Last Name	Bach
ID	6
Address Address	502 Lang Avenue
Address City	Pittsburgh
Address State	PA
Address ZIP	15228
Address Phone type1	Home
Address Phone number1	412-565-9978
Constituent Code Code1	Major Donor Prospect
Primary Addressee	
Primary Salutation	

At the bottom of the window, a status bar displays: "Press F8 for constituent window, Press F7 for search", "Gift 1 of 4", and "Running Total: \$225.00".

Tip: You can use shortcut keys to move around *The Raiser's Edge* without the use of your mouse. For example, to access the spouse details screen for a constituent, with your cursor in the **Sp. Name** field in the Constituent Window, press **F6** on your keyboard.

Just like you selected the fields to appear in the gift batch, you need to select the constituent fields to appear in the Constituent Window. Required fields are automatically selected, such as **Last Name**, to appear in the Constituent Window, in addition to the fields you designate as required with the **Fields** option in *Configuration*. For more information about how to designate a field as required, see the *Configuration & Security Guide*.

► Viewing the Constituent Window

1. From the Data Entry screen of a gift batch, select **View, Constituent Window** from the menu bar. For more information about how to open a gift batch, see "Accessing a Gift Batch" on page 79.

2. The Constituent Window appears on the right side of the screen. To resize the Constituent Window, click and drag the divider that exists between the Constituent Window and Data Entry screen.

The screenshot shows a window titled "Batch 38" with a menu bar (File, Edit, View, Gift, Constituent, Favorites, Tools, Help) and a toolbar. Below the toolbar is a table with columns: Constituent Name, Constituent ID, Amount, Date, Type, and a dropdown menu. The table lists four constituents: Julie Bach, Mark Adamson, Sean Davenport, and Marilyn Kessler. To the right of this table is a "Field" and "Value" section showing details for the selected constituent, Julie Bach, including her title (Ms.), first and last names, ID (6), address (502 Lang Avenue, Pittsburgh, PA, 15228), and phone number (412-565-9978). At the bottom, a status bar indicates "Gift 1 of 4" and "Running Total: \$225.00".

Constituent Name	Constituent ID	Amount	Date	Type
Bach, Julie	6	\$50.00	09/09/2005	Cash
Adamson, Mark	3	\$100.00	09/09/2005	Pledge
Davenport, Sean	15	\$25.00	09/09/2005	Pledge
Kessler, Marilyn	44	\$50.00	09/09/2005	Pledge

Field	Value
Title 1	Ms.
First Name	Julie
Last Name	Bach
ID	6
Address Address	502 Lang Avenue
Address City	Pittsburgh
Address State	PA
Address ZIP	15228
Address Phone type1	Home
Address Phone number1	412-565-9978
Constituent Code Code1	Major Donor Prospect
Primary Addressee	
Primary Salutation	

3. To hide the Constituent Window, select **View, Constituent Window** again from the menu bar.

► **Selecting the fields to appear in the Constituent Window**

Note: Many of the fields and options on the Define Constituent Fields screen work the same as the fields and options on the Fields tab of the Gift Batch Setup screen. For more information about the Gift Batch Setup screen, see "Gift Batch Setup" on page 93.

1. From the Data Entry screen of a gift batch, select **Constituent, Define Constituent Fields** from the menu bar. The Define Constituent Fields screen appears. For more information about how to open a gift batch, see "Accessing a Gift Batch" on page 79.

The screenshot shows the "Define Constituent Fields" dialog box. It has a title bar and a close button. The main area contains instructions: "Select the Constituent fields to be used for data entry. Fields and defaults can be selected for both individual and organization records." Below this are two radio buttons: "Individuals" (selected) and "Organizations". There are two panes: "Available Fields" on the left and "Data Entry Fields" on the right. The "Available Fields" pane lists various fields like "Biographical", "Anonymous", "Birth date", etc. The "Data Entry Fields" pane shows a table with "Field Name" and "Default Value" columns, listing fields like "Title 1", "First Name", "Last Name", etc. At the bottom are buttons for "Find...", "Select", "Remove", "OK", and "Cancel".

Select the Constituent fields to be used for data entry. Fields and defaults can be selected for both individual and organization records.

Define fields for: ☒ Individuals ☐ Organizations

Available Fields

- Biographical
- Anonymous
- Birth date
- Birthplace
- Constituent is a solicitor?
- Constituent is an honor/m
- Deceased
- Deceased Date
- Ethnicity
- First Name
- Gender

Data Entry Fields

Field Name	Default Value
Title 1	
First Name	
Last Name	
ID	
Address Address	
Address City	
Address State	
Address ZIP	
Address Phone type1	

Find... Select Remove OK Cancel

2. In the **Define fields for** field, to define the fields that appear in the Constituent Window for individual constituent records, select **Individuals**.
3. In the **Available fields** box, select a field to appear in the Constituent Window. For example, select the **Address Phone type** field.
4. To include the field in the Constituent Window, click **Select**. The **Address Phone type 1** field appears at the bottom of the **Data Entry Fields** grid.

Note: The order you list the fields in the **Data entry fields** grid is the order the fields appear in the Constituent Window. To rearrange the fields, select a field in the **Data entry fields** grid and click the up or down arrow to move the field to the appropriate place.

5. In the **Default Value** column of the **Data Entry Fields** grid, enter any necessary defaults for the Constituent Window. For example, you can enter the default of “Home” in the **Address Phone type 1** field. These defaults appear only when you add new constituents in the batch.

Define Constituent Fields

Select the Constituent fields to be used for data entry. Fields and defaults can be selected for both individual and organization records.

Define fields for: ☒ Individuals ☐ Organizations

Available Fields

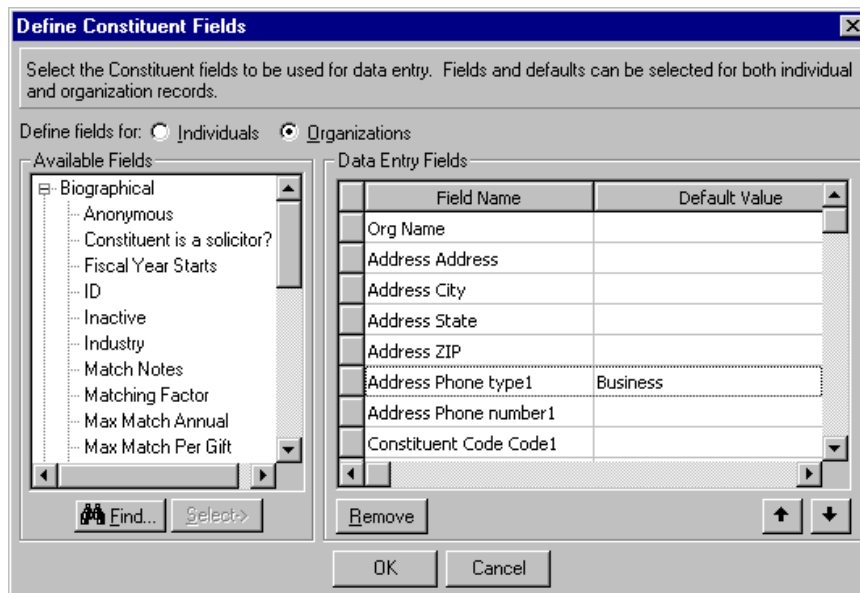
- Address Region
- Address Seasonal from
- Address Seasonal to
- Address Send mail to
- Address State
- Address Type
- Address ZIP
- Address Phone number
- Address Phone type
- Address Attributes
- Attributes

Data Entry Fields

Field Name	Default Value
First Name	
Last Name	
ID	
Address Address	
Address City	
Address State	
Address ZIP	
Address Phone type1	Home

Find... Select-> Remove Up Down OK Cancel

6. In the **Define fields for** field, select **Organization** to define the fields that appear in the Constituent Window for organization constituent records.

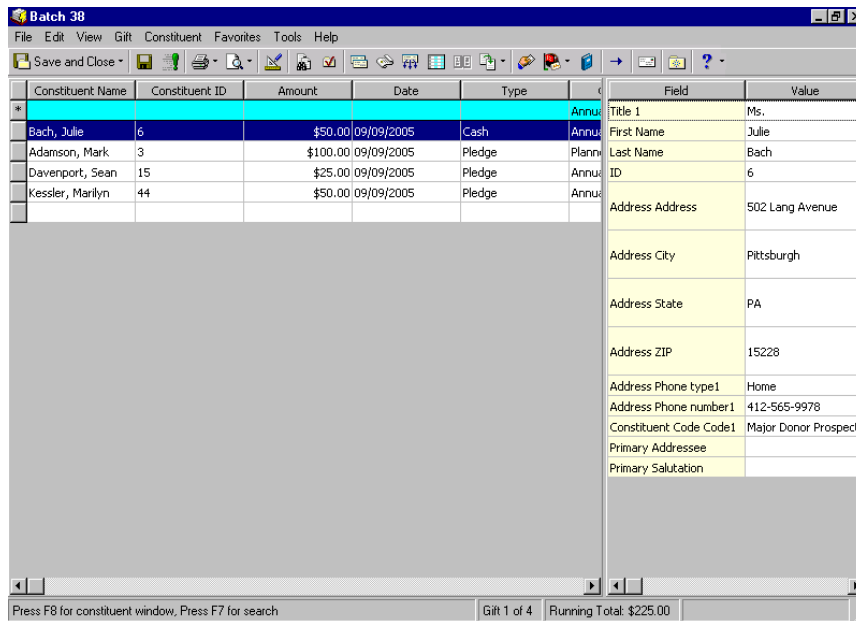


7. In the **Available fields** box, select a field to appear in the Constituent Window. For example, select the **Address Phone type** field.
8. To include the field in the Constituent Window, click **Select**. The **Address Phone type 1** field appears at the bottom of the **Data Entry Fields** grid.
9. In the **Default Value** column of the **Data Entry Fields** grid, enter any necessary defaults for the Constituent Window. For example, you can enter the default of "Business" in the **Address Phone type 1** field. These defaults appear only when you add new constituents in the batch.
10. To return to the data entry screen, click **OK**.

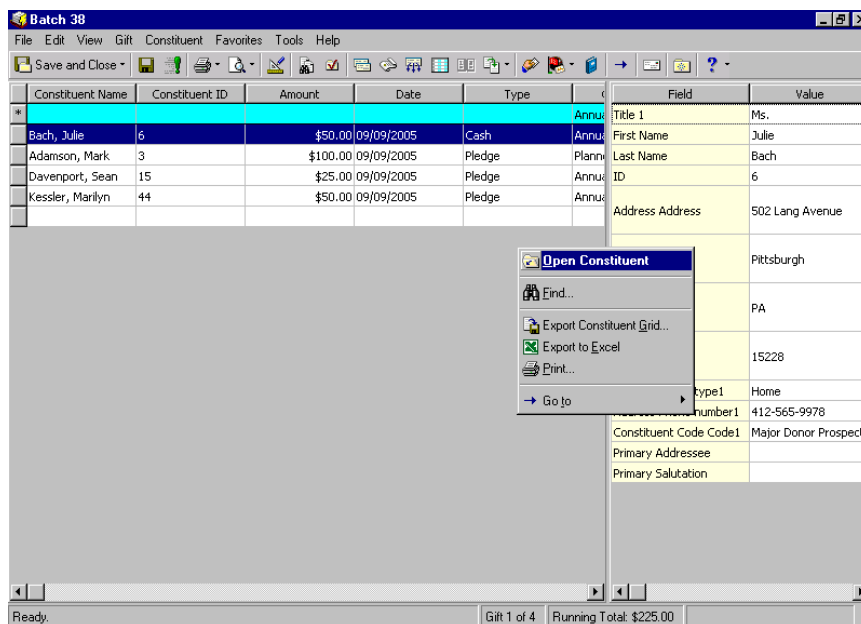
► **Accessing a donor's constituent record from the Constituent Window**

Some fields on the donor's constituent record cannot be displayed in the Constituent Window. If you need to add information about a donor, access the donor's constituent record from the Constituent Window.

1. From the Data Entry screen of a gift batch, select **View, Constituent Window** from the menu bar. For more information about how to open a gift batch, see "Accessing a Gift Batch" on page 79.



2. Right-click in the Constituent Window. A shortcut menu appears.



3. Select **Open Constituent**. The constituent record appears.

The screenshot shows a software window titled "Julie M. Bach". It has a menu bar with "File", "Edit", "View", "Constituent", "Letter", "Favorites", "Tools", and "Help". Below the menu bar is a toolbar with various icons. A tabbed interface is visible with tabs for "Attributes", "Media", "Actions", "Honor/Memorial", "Volunteer", "Prospect", "Membership", "Events", "Bio 1", "Bio 2", "Addresses", "Addressees/Salutations", "Relationships", "Appeals", "Notes", and "Gifts". The "Bio 1" tab is active, showing biographical data: Last name: Bach, First name: Julie, Middle name: Marie, Titles: Ms., Suffixes: , Nickname: Jules, Maiden name: , ID: 6, Gender: Female, SSN: 259-45-8496, Birth date: 03/27/1979, Age: 26, Marital status: Single, Spouse: , Solicit code: Do not phone on weekends. To the right, the "Preferred Address : Home" section shows Country: United States, Address lines: 502 Lang Avenue, City: Pittsburgh, State: PA, ZIP: 15228, and DPC: . Below this is a "Phones/Email/Links" table:

DWC	Type	Number/Email Address	Shared?
	Home	412-565-9978	Not Shared
	Email	jules@att.com	Cannot be Shared

At the bottom right, there are checkboxes for "This constituent": Is inactive, Is a solicitor, Gives anonymously, Has no valid addresses, Requests no email. At the very bottom, there are buttons for "Education", "Business", and "Bank". A status bar at the bottom left reads "Development Staff (12/03/2004 -)".

4. To save your changes and return to the Data Entry screen, click **Save and Close** on the toolbar.

► **Adding a new constituent using the Constituent Window**

You can add new constituents through the Constituent Window of the Data Entry screen. For example, when you add gifts to a batch, you notice you receive a check from a donor who is not currently a constituent in your database. From the Constituent Window, you can search for an existing record for that donor. If no record exists, you can add the new constituent to your database.

1. From the Data Entry screen of a gift batch, select **View, Constituent Window** from the menu bar. The Constituent Window appears. For more information about how to open a gift batch, see "Accessing a Gift Batch" on page 79.
2. In the **Constituent Name** column of a new row in the gift batch, enter the name of the new constituent.

3. Press **TAB** on your keyboard. The Open screen for constituents appears. The new constituent's last name appears in the **Last/Org name** and **First name** fields.

Open

Find: Constituent Search using query: <Default>

Open Cancel

Add New Options

Find Now New Search Previous Search

Find Constituents that meet these criteria:

Last/Org name: Lawson Address lines: City: State: ZIP: Class of: Credit card no:

First Name: Jason

Constituent ID: SSN: Membership ID: Bank acct. no:

☒ Display inactive constituents ☐ Check spouse name ☐ Exact match only ☐ Check nickname

☐ Display deceased constituents ☐ Check aliases ☐ Check contact name

Expand Results

4. To verify the new constituent does not have a record in the database, click **Find Now**.
5. If you cannot locate the constituent in the database, click **Add New**. From the submenu that appears, select whether to add an individual or organization record. For more information about how to add constituent records, see the *Constituent Data Entry Guide*.
6. The donor now has a constituent record in the database. You can add information to the constituent record with the Constituent Window, or you can access the constituent record to add complete information. For more information about how to access a donor's constituent record, see "Accessing a donor's constituent record from the Constituent Window" on page 131.

Status Bar

The status bar displays helpful information about the gifts entered in the batch. It is divided into four sections.

The screenshot shows a window titled "Batch 38" with a menu bar (File, Edit, View, Gift, Constituent, Favorites, Tools, Help) and a toolbar. Below the toolbar is a data entry grid with the following columns: Constituent Name, Constituent ID, Amount, Date, Type, Campaign, Appeal, and Package. The grid contains four rows of data:

Constituent Name	Constituent ID	Amount	Date	Type	Campaign	Appeal	Package
Bach, Julie	6	\$50.00	09/09/2005	Cash	Annual Campaign	Direct Mailing	
Adamson, Mark	3	\$100.00	09/09/2005	Pledge	Planned Giving C...	Membership Mailing	
Davenport, Sean	15	\$25.00	09/09/2005	Pledge	Annual Campaign	Direct Mailing	
Kessler, Marilyn	44	\$50.00	09/09/2005	Pledge	Annual Campaign	Direct Mailing	

Below the grid is a status bar with four sections:

- Press F7 for search
- Gift 4 of 4
- Running Total: \$225.00
- Hidden columns exist

The first section of the status bar displays messages related to data entry. For example, when you have focus in the **Amount** field, this section of the status bar displays "Press F7 for calculator".

The second section of the status bar displays the row number for the active row versus the total number of gifts in the batch. The total number of gifts in the batch updates every time you complete the entry for a gift. For example, if you enter 40 gifts in a batch and select the row for the tenth gift listed in the batch, "Gift 10 of 40" appears in this section of the status bar.

The third section of the status bar displays the total monetary amount entered in the batch. For example, if you entered 40 gifts in the batch that total \$5,600.05, "Running Total: \$5,600.05" appears in this section of the status bar.

When you hide one or more columns in the Data Entry grid, the last section of the status bar displays the message "Hidden columns exist". You can hide columns on the Defaults tab of the Gift Batch Setup screen, or you can select **View, Hide/Show Columns** from the menu bar. For more information about how to hide a column, see "Hiding a column in a batch" on page 147. If you do not hide any columns in the batch, no message appears in this section of the status bar.

Adding Gifts in the Data Entry Grid

After you set up a batch, you can begin to add gifts in the Data Entry grid. There is no limit to the number of gifts you can enter in a batch. However, we recommend you commit the batch at a regular interval.

Note: When you mark **When adding a gift to a batch, warn if constituent has** in *Configuration*, a screen appears and asks you to apply gifts to outstanding pledges or recurring gifts entered in the batch. This option only checks for gifts you manually enter in the batch. For payments that you automatically generate in the batch, you can check for outstanding pledges and recurring gifts when you commit the batch.

► Adding gifts to the Data Entry grid

Scenario: In response to your Direct Mailing appeal for your 2005 Annual Fund, you receive five cash gifts that total \$600 and two pledge gifts that total \$300.

Scenario: The first gift you want to add is a \$50 cash gift donated by Julie Bach. Your organization received Julie's personal check on 09/09/2005. The check number and date is 1302 and 08/25/2005, respectively.

Scenario: The second gift you want to add is a \$120 pledge gift donated by Kenneth Parker on 09/09/2005. Kenneth plans to pay his pledge in 12 monthly installments that begin on 10/01/2005.

Scenario: Before you can add new gifts to a batch, you must set up the batch. To set up the batch, select the batch number, fields, and defaults to include in the batch. This scenario uses the batch set up in "Setting up a new gift batch" on page 119.

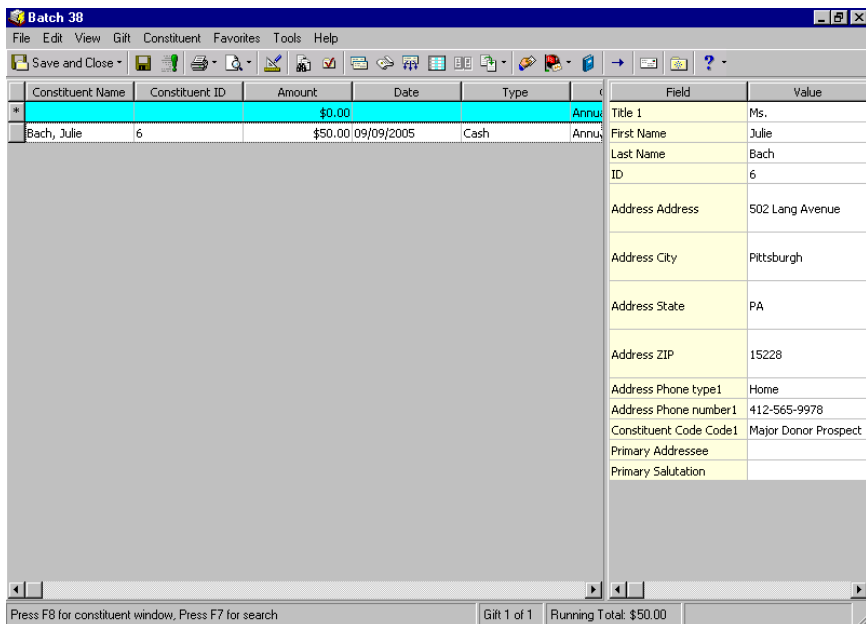
Note: The first row of the batch may display the Default Row. When you add gifts to a batch, make sure you add the gift information in the rows below the Default Row. For more information about the Default Row, see "Default Row" on page 125.

1. From the Batch page, open the gift batch with the description "Gifts received for the 2005 Annual Fund on 09/09/2005." The Data Entry screen appears for the gift batch. For more information about how to open a gift batch, see "Accessing a Gift Batch" on page 79.

Constituent Name	Constituent ID	Amount	Date	Type
*		\$0.00		Annua
		\$0.00		Annua

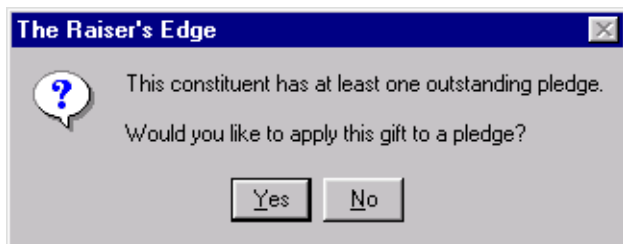
Note: To display the Constituent Window, select **View, Constituent Window** from the menu bar. To define the fields in the Constituent Window, select **Constituent, Define Constituent Fields** from the menu bar. For more information about the Constituent Window, see "Constituent Window" on page 126.

- Click in the first row of the **Constituent Name** column. The binoculars appear. Click the binoculars to access the Open screen for constituents and locate “Julie Bach” in your database. For more information about the Open screen for constituents, see “Constituent Batch” on page 1. After you locate Julie Bach in the database, her name appears in the first row of the **Constituent Name** column and information from her constituent record appears in the Constituent Window.



Note: When you add constituents in a batch, if a constituent has an outstanding pledge or recurring gift and you mark **Outstanding pledge balances** or **Outstanding recurring gifts** in the business rules section of *Configuration*, a message appears and prompts you to apply the gift payment to the outstanding pledge or recurring gift.

- A message appears and prompts you to add the gift payment to the outstanding pledge.



- Click **No**.

When you receive this message prompt, if you know that the pledge you want to pay is the outstanding pledge for the constituent, click **Yes** to work with the outstanding pledge. Alternatively, during the batch committing process, you can automatically apply payments to any outstanding pledges once you automatically generate all pledges with a payment due into a batch. For more information about how to automatically apply pledges when you commit a batch, see “Committing a gift batch” on page 204.

- In the **Constituent ID** column, do not enter any information because Julie Bach already has a **Constituent ID** entered on her constituent record. The information defaults in this field. You can view this information in the Constituent Window on the right side of the screen.
- In the **Amount** column, enter the amount \$50 because Julie donated a cash gift of \$50.
- In the **Date** column, enter the date 09/09/2005 because that is the date you received Julie’s gift.

Note: Auto Complete occurs when you type the first few letters of information in a field, and the rest of the information automatically defaults in. For example, if you type “C” in the **Type** field, then “Cash” automatically defaults.

8. In the **Type** column, select “Cash”. For more information about different gift types, see the *Gift Records Guide*.
9. In the **Pay method** column, select “Personal Check”.
10. In the **Check number** column, enter “1302” because this is the check number on Julie’s personal check.
11. In the **Check date** column, enter the date 08/25/2005 because this is the date Julie wrote the check to your organization.

Type	Package	Pay method	Check number	Check date	GL
Cash		Personal Check	1302	08/25/2005	09/09

Field	Value
Title 1	Ms.
First Name	Julie
Last Name	Bach
ID	6
Address Address	502 Lang Avenue
Address City	Pittsburgh
Address State	PA
Address ZIP	15228
Address Phone type1	Home
Address Phone number1	412-565-9978
Constituent Code Code1	Major Donor Prospect
Primary Addressee	
Primary Salutation	

Press F8 for constituent window, Press F3 for Gift 1 of 2 Running Total: \$50.00 Hidden columns exist

Warning: When you are ready to post a batch to **General Ledger**, some of your gifts in the batch may not post, depending on your security rights to the **GL post status** field. Security settings take effect once you try to post. If you do not have rights to the **GL post status** field for certain gifts, when you try to post to **General Ledger**, some gifts may post and some gifts may create exceptions. For more information about security settings, see the *Configuration & Security Guide*.

12. In the **GL post date** column, enter the date 09/09/2005, which is the date you plan to post the gifts to **General Ledger**.
13. In the **GL post status** column, select “Not Posted”.
14. In the **Acknowledge** column, select “Not Acknowledged”. You plan to use the Donor Acknowledgement Letters mail task in *Mail* to process this acknowledgement letter later in the week. For more information about how to create letters in *Mail*, see the *Mail Guide*.

Note: To move from field to field in the Data Entry grid, use the arrow keys in conjunction with the Control key on your keyboard. For example, **CTRL + RIGHT ARROW KEY** moves your cursor to the right. You can also press **TAB** to move forward one field or **SHIFT + TAB** to move back one field.

15. In the **Receipt Amount** column, enter the amount \$50 because that is the tax-deductible portion of Julie's gift.

The screenshot shows the 'Batch 38' window with a menu bar (File, Edit, View, Gift, Constituent, Favorites, Tools, Help) and a toolbar. The main data grid has columns: Check date, GL post date, GL post status, Acknowledge, and Receipt Amount. The first row shows '08/25/2005', '09/09/2005', 'Not Posted', 'Not Acknowledged', and '\$50.00'. The right pane shows constituent details for Julie Bach, including address (502 Lang Avenue, Pittsburgh, PA 15228) and phone number (412-565-9978). The status is 'Major Donor Prospect'.

Check date	GL post date	GL post status	Acknowledge	Receipt Amount
08/25/2005	09/09/2005	Not Posted	Not Acknowledged	\$50.00

Field Value

Title 1	Ms.
First Name	Julie
Last Name	Bach
ID	6
Address Address	502 Lang Avenue
Address City	Pittsburgh
Address State	PA
Address ZIP	15228
Address Phone type1	Home
Address Phone number1	412-565-9978
Constituent Code Code1	Major Donor Prospect
Primary Addressee	
Primary Salutation	

Press F8 for constituent window, Press F7 for Gift 1 of 2 Running Total: \$50.00 Hidden columns exist

Note: When you add or edit credit card information in a batch, *The Raiser's Edge* automatically sends the credit card information to the Blackbaud *Payment Service* when you leave the row. Depending on your Internet connection, you may experience a slight delay. After *The Raiser's Edge* securely stores the credit card information, only the last four digits of the credit card number appear in the row.

16. Press **TAB** on your keyboard to begin the next row in the Data Entry grid.
17. Click in the second row of the **Constituent Name** column. The binoculars appear. Click the binoculars to access the Open screen for constituents and locate "Kenneth Parker" in the database. For more information about how to open constituent records, see the *Constituent Data Entry Guide*. After you locate Kenneth Parker in the database, his name appears in the second row of the **Constituent Name** column and information from his constituent record appears in the Constituent Window.

The screenshot shows the 'Batch 38' window with the same menu and toolbar. The data grid now has three rows. The first row is for Julie Bach with a receipt amount of \$50.00. The second row is for Kenneth Parker with a receipt amount of \$120.00. The right pane shows constituent details for Kenneth Parker, including address (557 Dogwood Court, Omaha, NE 68147) and phone number (402-821-6954). The status is 'Current Parent'.

Constituent Name	Constituent ID	Amount	Date	Type
Bach, Julie	6	\$50.00	09/09/2005	Cash
Parker, Kenneth	125	\$120.00	09/09/2005	Pledge

Field Value

Title 1	Mr.
First Name	Kenneth
Last Name	Parker
ID	125
Address Address	557 Dogwood Court
Address City	Omaha
Address State	NE
Address ZIP	68147
Address Phone type1	Cellular Phone
Address Phone number1	402-821-6954
Constituent Code Code1	Current Parent
Primary Addressee	
Primary Salutation	

Press F8 for constituent window, Press F7 for Gift 2 of 2 Running Total: \$170.00 Hidden columns exist

18. In the **Constituent ID** column, do not enter any information because Kenneth Parker already has a **Constituent ID** entered on his constituent record. This information defaults into the column. You can view this information in the Constituent Window on the right side of the screen.
19. In the **Amount** column, enter the amount \$120 because Kenneth plans to donate a monthly gift of \$10 for the next year.
20. In the **Date** column, enter the date 09/09/2005 because that is the date you received the pledge from Kenneth.
21. In the **Type** column, select "Pledge". For more information about the different gift types, see the *Gift Records Guide*.

Note: When you enter a pledge, you must specify the installment schedule. For more information about pledge installments, see the *Gift Records Guide*.

22. From the menu bar, select **Gift, Installment Information**. The Pledge Installment Schedule screen appears.

23. In the **Frequency** field, select "Monthly" because Kenneth is fulfilling his pledge on a monthly payment schedule.
24. In the **No. Installments** field, enter "12" because Kenneth wants to pay his pledge in 12 payments.
25. Mark **Day [] of every [] month(s)** and enter "1" in both fields. Now the option reads **Day 1 of every 1 month(s)**. Kenneth wants to pay his pledge on the first day of every month.
26. In the **Starting on** field, enter the date 10/01/2005 because this is the date Kenneth plans to send his first pledge payment.
27. Click **Distribute**. The grid displays the installment schedule for Kenneth's pledge.

Date	Amount
10/1/2005	\$10.
11/1/2005	\$10.
12/1/2005	\$10.
1/1/2006	\$10.

28. Click **OK**. You return to the Data Entry screen.
29. In the **Payment method** column, select "Personal Check".

30. In the **Check number** and **Check date** columns, do not enter any information because a pledge does not represent an actual gift.
31. In the **GL post date** column, enter the date 09/09/2005, which is the date you plan to post the gifts to **General Ledger**.
32. In the **GL post status** column, select “Not Posted”.
33. In the **Acknowledge** column, select “Not Acknowledged”. You plan to use the Donor Acknowledgement Letters mail task in *Mail* to process this acknowledgement letter later in the week. For more information about creating letters in *Mail*, see the *Mail Guide*.
34. In the **Receipt Amount** column, enter the amount \$120 because this is the tax-deductible portion of Kenneth’s gift.

Check date	GL post date	GL post status	Acknowledge	Receipt Amount	Field	Value
				\$0.00	Title 1	Mr.
08/25/2005	09/09/2005	Not Posted	Not Acknowledged	\$50.00	First Name	Kenneth
	09/09/2005	Not Posted	Not Acknowledged	\$120.00	Last Name	Parker
					ID	125
					Address Address	557 Dogwood Court
					Address City	Omaha
					Address State	NE
					Address ZIP	68147
					Address Phone type1	Cellular Phone
					Address Phone number1	402-821-6954
					Constituent Code Code1	Current Parent
					Primary Addressee	
					Primary Salutation	

Press F8 for constituent window, Press F7 Gift 2 of 3 Running Total: \$170.00 Hidden columns exist

35. Press **TAB** on your keyboard to create a new row so you can add the next gift to the batch.
36. With the same methods you used to add gifts for Julie Bach and Kenneth Parker in the section “Adding gifts to the Data Entry grid” on page 135, add the gifts below. For some of these examples, messages may appear that request you apply gifts to outstanding payments, add appeals to the constituents’ records, or update matching gift records for the constituents.
 - Carter Pharmaceuticals donates a cash gift of \$200, which your organization receives on 09/09/2005. This donation is given by way of a business check with a check date and number of 08/28/2005 and 5120, respectively. This gift has not been acknowledged or posted to **General Ledger**. The receipt amount for this gift is \$200.
 - Lorrel Justin donates a cash gift of \$75, which your organization receives on 09/09/2005. This donation is given by way of a personal check with a check date and number of 08/27/2005 and 305, respectively. This gift has not been acknowledged or posted to **General Ledger**. The receipt amount for this gift is \$75.
 - David Murphy donates a cash gift of \$150, which your organization receives on 09/09/2005. This donation was given by way of a personal check with a check date and number of 09/01/2005 and 3115, respectively. This gift has not been acknowledged or posted to **General Ledger**. The receipt amount for this gift is \$150.
 - Renee Wilson donates a pledge gift of \$180, which your organization receives on 09/09/2005. Renee plans to pay her pledge with a single installment due on 10/01/2005. This gift has not been acknowledged or posted to **General Ledger**. The receipt amount for this gift is \$180.

- Cam Phan donates a cash gift of \$125, which your organization receives on 09/09/2005. This donation was given by way of a personal check with a check date and number of 08/28/2005 and 6021, respectively. This gift has not been acknowledged or posted to **General Ledger**. The receipt amount for this gift is \$125.

37. To save the information entered in the batch and close the Data Entry screen, click **Save and Close** on the toolbar.

Data Entry Screen Menu Options

This section contains information about the Data Entry screen menu options, including how to add and remove fields from a gift batch, and how to hide and freeze columns in the Data Entry grid. Not all menu options are discussed in this section because the menu bar is very similar throughout *The Raiser's Edge*. For more information about menu options, see the *Program Basics Guide*.

Viewing Gift Properties

You can easily view the properties for a gift batch or gift row in a batch. The Properties screen provides detailed information about a batch or specific gift, such as the running amount of gifts in the batch, projected amount of gifts, gift type, and gift amount.

► Viewing properties for a gift batch

1. From the Data Entry screen of a gift batch, select **File, Properties** from the menu bar. The Properties screen appears. For more information about how to open a gift batch, see "Accessing a Gift Batch" on page 79.



2. You can view the specific properties of a gift batch and their values. When you finish viewing the screen, click **Close**. You return to the Data Entry screen of the gift batch.

► **Viewing properties for a gift row in a batch**

1. From the Data Entry screen of a gift batch, select **Gift, Gift Properties** from the menu bar. The Gift Properties screen appears. For more information about how to open a gift batch, see “Accessing a Gift Batch” on page 79.

Gift 1 of 3	
Constituent	Mr. Max G. Taylor
Gift Type	Pledge
Gift Amount	\$100.00
Matched	No
Soft Credited	No
Honor/Memorial	No
Has Installments	Yes
Has a Payment	Yes
Applied to Pledge	No
Applied to Covenant	No
Applied to Recurring Gift	No

Close

2. You can view the specific properties of a gift row such as the constituent’s name and the gift type. When you finish viewing the Gift screen, click **Close**. You return to the Data Entry screen of the gift batch.

Selecting, Inserting, and Deleting Rows from the Data Entry Grid

You can use the procedures below to select, insert, and delete rows in a gift batch. It is useful to select rows to insert or delete rows, or export data to another application. It is useful to insert rows in a gift batch to enter gifts in the batch in a certain order. You may need to insert a row in the batch to maintain the order you use. You can also easily delete rows in a gift batch. For example, you may need to delete a gift row because you accidentally add a gift in the batch twice.

► **Selecting rows from the Data Entry grid of a batch**

Note: To select a row, you can also click on the gray square to the left of the row.

1. From the Data Entry screen of a batch and with your cursor in the row you want highlighted, select **Edit, Select Row** from the menu bar. For more information about how to open a gift batch, see “Accessing a Gift Batch” on page 79.

Constituent Name	Constituent ID	Amount	Date	Type	Package	Pay method	Check number
		\$0.00					
Bach, Julie	6	\$50.00	09/09/2005	Cash		Personal Check	1302
Parker, Kenneth	125	\$120.00	09/09/2005	Pledge		Personal Check	

2. To deselect the highlighted row, click in any other row in the Data Entry grid.
3. With your cursor anywhere in the Data Entry grid, select **Edit, Select All Rows**. All rows are now highlighted.
4. To deselect the highlighted rows, click anywhere in the Data Entry grid.

► **Inserting a row in the Data Entry grid of a batch**

Note: To select a row in the Data Entry grid, click the gray square to the left of the row in the Data Entry grid.

1. From the Data Entry screen of a batch, select the row below which you want to insert a new blank row. For more information about how to open a gift batch, see “Accessing a Gift Batch” on page 79.

Constituent Name	Constituent ID	Amount	Date	Type	Package	Pay method	Check numb
*		\$0.00					
Bach, Julie	6	\$50.00	09/09/2005	Cash		Personal Check	1302
Parker, Kenneth	125	\$120.00	09/09/2005	Pledge		Personal Check	

Note: To insert a new row, right-click the selected row to access the shortcut menu. When the shortcut menu appears, select **Insert Row**.

2. From the menu bar, select **Edit, Insert Row**.

► Deleting a row in the batch

Note: To select a row in the Data Entry grid, click the gray square to the left of the row in the Data Entry grid.

1. From the Data Entry screen for a batch, select the row to delete from the batch. For more information about how to open a gift batch, see “Accessing a Gift Batch” on page 79.

Constituent Name	Constituent ID	Amount	Date	Type	Package	Pay method	Check numb
*		\$0.00					
Bach, Julie	6	\$50.00	09/09/2005	Cash		Personal Check	1302
Parker, Kenneth	125	\$120.00	09/09/2005	Pledge		Personal Check	

Note: To delete a row, you can also right-click the highlighted row to access the shortcut menu. When the shortcut menu appears, select **Delete Row**.

2. From the menu bar, select **Edit, Delete Row**.

If the gift row you select to delete is linked to a membership, proposal, or an event and you have not yet committed the batch, a confirmation message appears to ask whether to delete the gift.



Warning: When you delete a row in a batch or change the constituent name in a batch row, and the row is linked to an object such as a membership or event, a screen appears to notify you of the linked object.

3. To permanently delete the row from the Data Entry grid, click **Yes**.

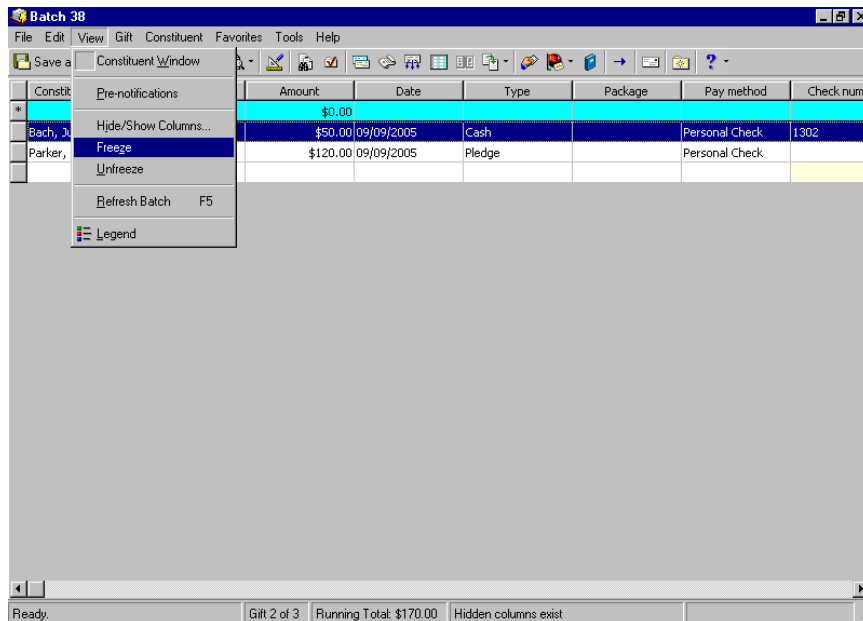
If you create a new membership from a gift row and link that gift to the new membership, the membership is established in the database, regardless of whether you commit the gift batch to the database. If you link a gift row to an existing membership and delete that gift row before you commit the batch to the database, no information is added or changed on the existing membership record.

Freezing and Unfreezing Columns in the Data Entry Grid

To lock and unlock a selected column and all columns to its left, use the **Freeze** and **Unfreeze** menu options. For example, you may want to freeze the **Constituent Name** column so you can always view the name of the constituent for which you are adding a gift. When you freeze a column, it remains stationary and visible regardless of the horizontal direction you scroll. When you unfreeze a column, the columns move to the left or right corresponding to the horizontal direction you scroll. If the selected column is already frozen, the **Freeze** menu option is disabled.

► **Freezing a column in the Data Entry grid of a batch**

1. From the Data Entry screen for a batch, put your cursor in any row of the right-most column to freeze. For example, to freeze the first three columns in the batch, put your cursor in any row in the third column in the batch and select **View, Freeze** from the menu bar. For more information about how to open a gift batch, see “Accessing a Gift Batch” on page 79.

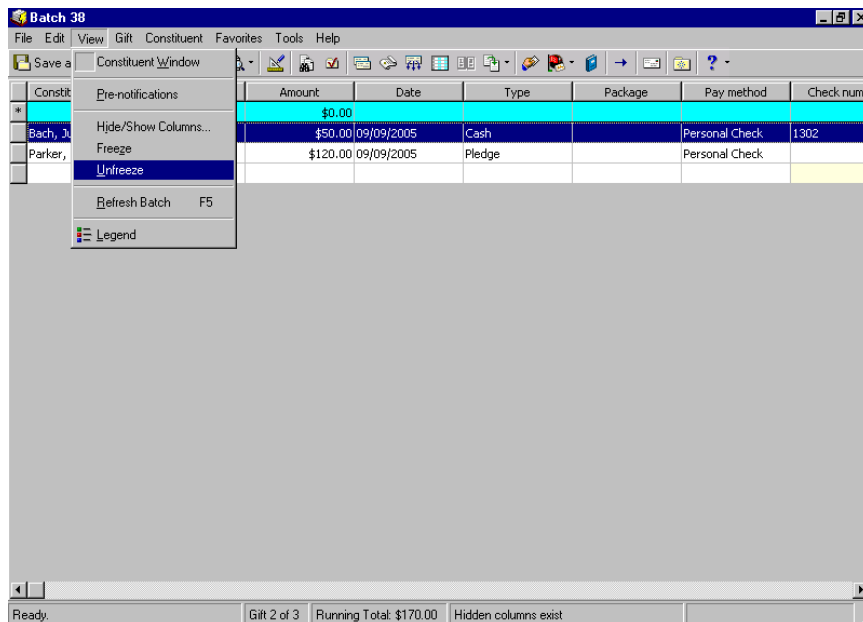


2. When you use the horizontal scroll bar, the selected column and all columns to the left of the selected column remain stationary.

► **Unfreezing a column in the Data Entry grid of a batch**

Note: To freeze or unfreeze a column, you can also right-click the column heading to freeze or unfreeze to access the shortcut menu. When the shortcut menu appears, select **Freeze** or **Unfreeze** from the menu.

1. From the Data Entry screen for a batch, put your cursor in any row of the left-most column to unfreeze. For example, if the first three columns in the batch are frozen and you want to unfreeze the second and third column, put your cursor in any row in the second column in the batch and select **View, Unfreeze** from the menu bar. For more information about how to open a gift batch, see “Accessing a Gift Batch” on page 79.



2. The selected column and all columns to the right of the selected column are unfrozen. You can move to the left or right of the columns corresponding to the horizontal direction you scroll.

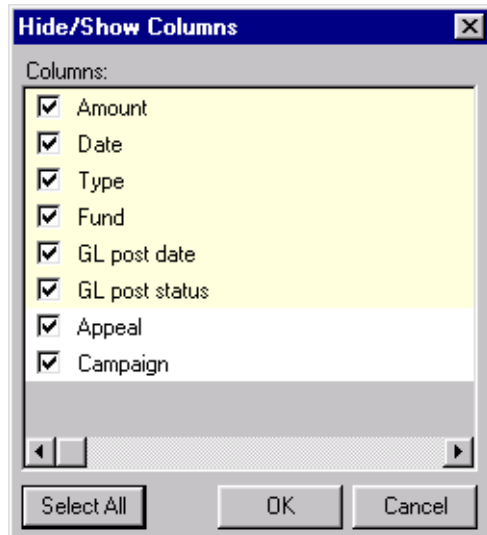
Hiding Columns and Viewing Hidden Columns in a Batch

When you select the same entry for a particular field for every gift in a batch, you can enter a default and hide the field. For example, you add cash gifts to a batch. Because each gift has the gift type of Cash, you can add Cash as the default for the **Type** field and hide the **Type** field. You cannot hide the **Constituent Name** field because the entry in this field may be different for each gift you enter. A batch contains hidden columns if “Hidden Columns Exist” displays in the second section of the status bar at the bottom of the Data Entry screen.

► Hiding a column in a batch

Warning: If you have not entered a default for a field, you should not hide the field. Even though a hidden field is not visible on the Data Entry screen, it is still included in the batch and you need to enter data in the field.

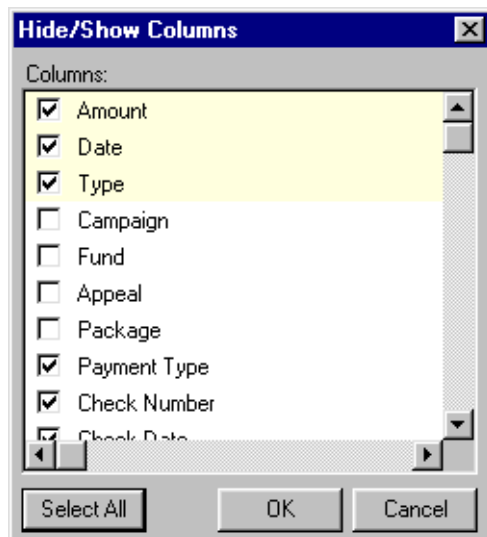
1. From the Data Entry screen for a batch, select **View, Hide/Show Columns**. The Hide/Show Columns screen appears. For more information about how to open a gift batch, see “Accessing a Gift Batch” on page 79.



2. Unmark the checkbox next to the columns to hide in the Data Entry grid. Click **OK**.
3. A message appears in the second section of the status bar to indicate that hidden columns exist.

► **Viewing hidden columns in a batch**

1. From the Data Entry screen for a batch, select **View, Hide/Show Columns** from the menu bar. For more information about how to open a gift batch, see “Accessing a Gift Batch” on page 79. The Hide/Show Columns screen appears.



2. Mark the checkbox next to the columns to appear in the Data Entry grid. For example, if you want to view the **Campaign** column in the Data Entry grid, mark **Campaign**.

Note: To display all the columns in the Data Entry grid, click **Select All**.

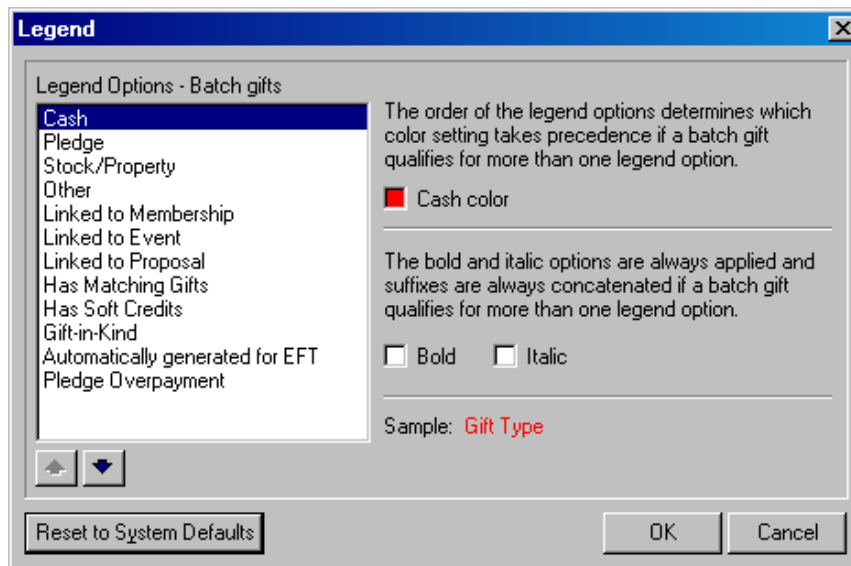
3. To display the selected columns in the Data Entry grid, click **OK**.

Viewing Legends in a Batch

Legends differentiate the type of records in a grid. You can use legends to identify different records at a glance. For example, you can specify that pledges appear in a different color and font than cash gifts in a batch. You can view a legend for the batch you are working on to see which colors represent specific gifts or functions you completed for that batch. To do this, select **View, Legend** from the menu bar of a gift batch. This option is especially useful if you have numerous gifts within one batch. For more information about legends, see the *Program Basics Guide*.

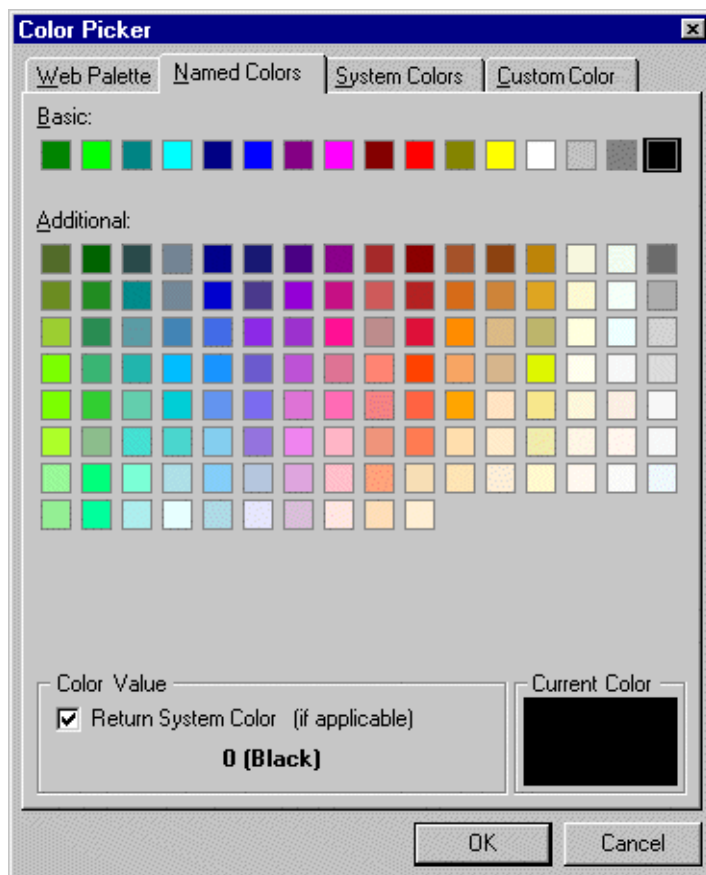
► Viewing legends for a batch

1. From the Data Entry screen for a batch, select **View, Legend**. The Legend screen appears. For more information about how to open a gift batch, see “Accessing a Gift Batch” on page 79.



2. From the list on the left, select a legend option (the gift type or function) to which you want to designate a specific color.

3. Click the square color box. The Color Picker screen appears and displays the color choices for the legend options.



4. To select the color you want, click on the color square and click **OK**. You return to the Legend screen.
5. To make your legend options appear in a designated color, bold, and italic, mark **Bold** and **Italic**.
In some cases, you may have two different legend options that qualify under the same legend category. For example, some cash gifts you enter in the batch are also linked to memberships. This means that cash gifts linked to memberships should appear in the same color. Even though you specified **Cash** gifts to appear in green and gifts **linked to Membership** to appear in red, because **Cash** is listed first in the Legend screen, **linked to Membership** will appear in green.
6. To close the Legend screen, click **OK**. You return to the Data Entry screen of the batch.

Adding a Matching Gift from a Batch

From the Matching Gifts screen, you can add a gift record for a gift donated by a business matching a constituent's donation. To access the Matching Gifts screen, select **Gift, Match** from the Gift Batch Data Entry screen menu. For more information about how to add and pay matching gift pledges in *Batch*, see the *Gift Records Guide*.



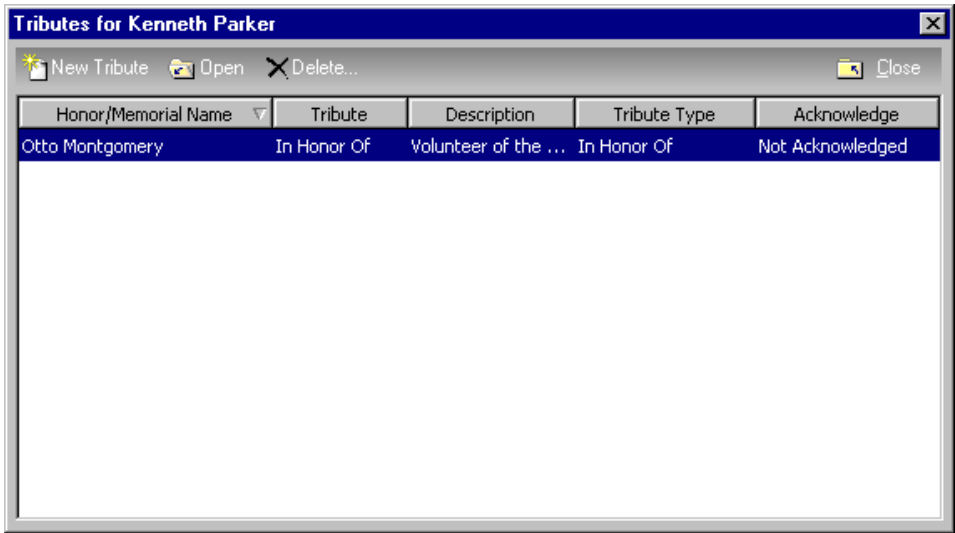
Matched By	Match Amount	Match Date	Fund
Toy World, Inc.	\$120.00	09/09/2005	2005 Annual Fund

Adding Honor/Memorial Information from a Batch

If you use the optional module *Honor/Memorial Tracking*, you can track detailed information about donations given in honor, celebration, or memory of an individual or organization. To track this detailed information, designate a constituent as an honor/memorial. Once you mark a constituent as an honor/memorial on the Honor/Memorial tab of the constituent record, you can set up tribute records for that constituent. You create tributes to specify why gifts are being given to the honor/memorial.

Tip: To access the Tributes screen., you can also press **CTRL + B** on your keyboard.

For example, you mark Robert Hernandez as an honor/memorial on his constituent record. Robert now receives tributes such as “In Special Recognition of” or “In Honor Of” so you can designate specific gifts to honor Robert for his contributions or volunteer work. In *Batch*, you can select **Gift, Tribute** from the Gift Batch Data Entry screen menu to add new tribute information for a constituent. For more information about how to add tribute gifts in *Batch*, see the *Tribute Gifts Guide*.



Adding Soft Credit Information from a Batch

A soft credit enables more than one constituent to be credited for a single gift without having to create gift duplicate records in your database. To add soft credits through *Batch*, select **Gift, Soft Credit** from the menu bar of the Gift Batch Data Entry screen. On the screen, you can determine which constituents to soft credit for gifts and the amount to soft credit. Adding soft credit information for a gift entered in a batch is very similar to adding soft credit information through a gift record. For more information about the Soft Credit tab on a gift record, see the *Gift Records Guide*.

► Adding a soft credit to a gift

Scenario: Melissa Elzy and Michelle Taylor are good friends. Both contribute their time and effort to your organization through volunteering. This year, they decide to donate a \$2000 gift to your organization, and both want to be equally credited for the gift. To credit both constituents for the gift without adding the gift twice, you can add the gift on Michelle Taylor's constituent record and soft credit Melissa Elzy for the full amount of the gift. For more information about how to enter gifts in a batch, see "Adding gifts to the Data Entry grid" on page 135.

1. From a gift batch, add a gift of \$2,000 for Michelle Taylor as shown on the screen below. For more information about how to enter gifts into the batch, see "Adding gifts to the Data Entry grid" on page 135.

The screenshot shows the 'Batch 19' window with a menu bar (File, Edit, View, Gift, Constituent, Favorites, Tools, Help) and a toolbar. Below the toolbar is a table with the following data:

Constituent Name	Amount	Date	Type	Fund	GL post date
Taylor, Michelle	\$2,000.00	02/24/2005	Cash	Building Fund	02/24/2005

At the bottom of the window, there is a status bar that reads: 'Press F3 for today's date, F7 for calendar' and 'Gift 1 of 1 Running Total: \$0.00'.

2. Select the gift row you added for Michelle Taylor.

The screenshot shows the 'Batch 19' window with the same table as the previous screenshot. The row for 'Taylor, Michelle' is now highlighted in blue, indicating it is selected. The status bar at the bottom now reads: 'Press F7 for search' and 'Gift 1 of 2 Running Total: \$2,000.00'.

- From the menu bar, select **Gift, Soft Credit**. The Soft Credit screen appears.

Constituent Name	Amount
Mrs. Melissa Christina Elzy	\$2,000.00

- In the **Display by** frame, select **Amount**.
In the **Display by** frame, the **Amount** option shows the amount value of the soft credit and the **Percent** option shows the percent value of the soft credit.
- Click in the first row of the **Constituent Name** column. The binoculars appear. Click the binoculars to search for Melissa Elzy in the database. When you locate Melissa Elzy, the program enters her name in the first row of the **Constituent Name** column.
- In the **Amount** column, enter the amount \$2,000 to equally credit Melissa Elzy for the gift.
- Click **OK**. You return to the Data Entry screen for the batch.

Splitting Gifts between Multiple Campaigns, Funds, Appeals, and Packages from a Batch

Note: If you enter a write off for a pledge split gift, be aware that the write off split amount is distributed based on the original distribution of the gift on the pledge Split Gift tab of a gift record. For example, if you enter a \$1000 pledge split gift and credit the Building Fund with \$600 and the 2005 Annual Fund with the remaining \$400, the split is 60%, 40%, respectively. If you write off any of the balance for this pledge, 60 percent of the amount goes to the Building Fund and 40 percent goes to the 2005 Annual Fund. For more information about how to write off pledge gifts, see the *Gift Records Guide*.

You can split a gift between multiple campaigns, funds, appeals, or packages. When you split a gift, you must specify an amount or percent of the gift designated to each campaign, fund, appeal, or package. To access the screen through *Batch*, select **Gift, Split Gift** from the menu bar of the screen. For more information about how to split gifts, see the *Gift Records Guide*.

► **Splitting a gift between two funds**

Scenario: Stephanie Smith sent a \$4,000 check for the Annual Campaign. She would like her gift split evenly between the Building Fund and the Botanical Garden Fund. To split the gift as the constituent requests, you need to enter Stephanie's gift in the batch and then select the **Split Gift** option in the menu bar. For more information about how to enter gifts in a batch, see "Adding gifts to the Data Entry grid" on page 135.

1. From a gift batch, add a gift of \$4,000 for Stephanie Smith as shown on the screen below. For more information about how to add gifts in a batch, see "Adding Gifts in the Data Entry Grid" on page 134.

The screenshot shows the 'Batch 20' window with a menu bar (File, Edit, View, Gift, Constituent, Favorites, Tools, Help) and a toolbar. Below the toolbar is a table with the following data:

Constituent Name	Amount	Date	Type	Fund	GL post date	
Smith, Stephanie	\$4,000.00	02/24/2005	Cash	Building Fund	02/24/2005	No

The status bar at the bottom indicates 'Ready.' and 'Gift 1 of 1 Running Total: \$0.00'.

2. Click in the gift row you added for Stephanie Smith.

The screenshot shows the 'Batch 20' window with the same table as the previous screenshot. The row for Stephanie Smith is now highlighted in blue, indicating it is selected. The status bar at the bottom indicates 'Press F7 for search' and 'Gift 1 of 1 Running Total: \$0.00'.

Note: To avoid adding duplicate records, we strongly recommend you click the binoculars to search for the record or select from the list.

- From the menu bar, select **Gift, Split Gift**. The Split Gift screen appears.

Campaign	Fund	Appeal	Package	Amount

Gift amount: \$4,000.00 Distributed: \$0.00 Remaining: \$4,000.00

Note: If you do not enter the Annual Campaign and the Direct Mailing appeal again in the second row, the Annual Campaign and the Direct Mailing appeal are credited with only 50% of the gift because that is the distribution you designated in the first row of the Split Gift grid.

- In the **Display by** field, select whether to split the gift based on the amount or percent of the gift. For this example, select **Amount**.
- In the first row of the **Campaign** column, select "Annual Campaign".
- In the first row of the **Fund** column, select "Building Fund".
- In the first row of the **Appeal** column, select "Direct Mailing".
- To begin a new row in the Split Gift grid, press **TAB** on your keyboard.
- In the second row of the **Campaign** column, select "Annual Campaign".
- In the second row of the **Fund** column, select "Botanical Garden Fund".
- In the second row of the **Appeal** column, select "Direct Mailing".

- Click the **Distribute** button to automatically divide the gift amount evenly between the funds you selected. Each fund receives \$2000.

Split Gift for Ms. Stephanie Gail Smith

Display by: ☒ Amount ☐ Percent

Campaign	Fund	Appeal	Package	Amount
Annual Campaign	Building Fund	Direct Mailing		\$2,000.00
Annual Campaign	Botanical Garden F...	Direct Mailing		\$2,000.00

Distribute...

Gift amount: \$4,000.00 Distributed: \$4,000.00 Remaining: \$0.00

OK Cancel

- Click **OK**. You return to the Data Entry screen of the batch.

Adding Benefits for a Gift in a Batch

When a constituent donates a gift to your organization, you may want to give certain benefits, such as a free shirt or newsletter, as thanks for a donation. To add benefits for a constituent through *Batch*, select **Gift, Benefits** from the menu bar of the Data Entry screen. For more information about benefits, see the *Gift Records Guide*.

► Adding benefits to a gift

Scenario: Today, you received a \$500 cash donation from John Smith for the 2005 Annual Fund. You are currently entering his gift in the batch, and would like to send him a T-shirt this afternoon to thank him for his donation. You can add this information to John's record as you add his gift in the batch. For more information about how to enter gifts in a batch, see "Adding gifts to the Data Entry grid" on page 135.

1. From a gift batch, add a gift of \$500 for John Smith as shown on the screen below. For more information about how to enter gifts into the batch, see "Adding Gifts in the Data Entry Grid" on page 134.

The screenshot shows a software window titled "Batch 21". It has a menu bar with "File", "Edit", "View", "Gift", "Constituent", "Favorites", "Tools", and "Help". Below the menu is a toolbar with various icons. The main area is a data grid with the following columns: "Constituent Name", "Amount", "Date", "Type", "Fund", "GL post date", and a partially visible "No" column. The first row of data contains: "Smith, John", "\$500.00", "02/24/2005", "Cash", "2005 Annual Fund", "02/24/2005", and "No". The status bar at the bottom shows "Ready.", "Gift 1 of 1", and "Running Total: \$0.00".

Constituent Name	Amount	Date	Type	Fund	GL post date	No
Smith, John	\$500.00	02/24/2005	Cash	2005 Annual Fund	02/24/2005	No

2. From the Data Entry screen, select the gift row you added for John Smith.

This screenshot is similar to the previous one, but the first row of the data grid is highlighted in blue, indicating it is selected. The status bar at the bottom now shows "Ready.", "Gift 2 of 2", and "Running Total: \$500.00".

Constituent Name	Amount	Date	Type	Fund	GL post date	No
John Smith	\$500.00	02/15/2005	Cash	2005 Annual Fund	02/15/2005	No

Note: You can add entries to the **Benefit** table in *Configuration*. On the *Configuration* page, click **Tables** and select **Benefits** from the list on the left side of the screen. After you select **Benefits**, click **New Table Entry** on the action bar to add additional benefits to the list. For each benefit through the **Tables** option in *Configuration*, you can also enter a default unit cost.

- From the menu bar, select **Gift, Benefits**. The Benefits screen appears.

Benefit	Count	Unit Cost	Total Benefit/Value	Sent/Fulfilled	Comments
T-Shirt	1	\$11.00	\$11.00	02/14/2005	

Load From... Total: \$11.00

Notes:

☐ Include notes on receipt

OK Cancel

- In the first row of the **Benefit** column, click the arrow and select "T-Shirt" from the list.
- In the first row of the **Count** column, enter "1" to indicate you are sending one T-Shirt to John Smith.
- In the first row of the **Unit Cost** column, the program defaults the amount \$11 because this is the **Unit Cost** entered in *Configuration* for a T-Shirt. When you tab through the **Unit Cost** column, the program automatically calculates the **Total Benefit Value** of the T-Shirt to be \$11.
- In the **Sent/Fulfilled** column, enter today's date because this afternoon, you plan to send the T-Shirt to John.

Note: A message appears to prompt you to update the receipt amount even if you did not select receipt amount as a gift field in the batch.

- Click **OK**. When you add any information on the screen that changes the benefit total, the program displays a message.

The Raiser's Edge

? The total benefit value has changed. Do you wish to update the receipt amount to reflect these changes?

The new receipt amount would be \$489.00?

Yes No Cancel

The benefit total shows you the exact amount of the gift minus the amount of benefits you have attributed to the gift. You can update your receipts to show this deduction, or you can keep your receipt amounts matching your gift amounts.

- To update the receipt amount to reflect the new benefit cost, click **Yes**. You return to the Benefits screen of the batch.

Adding Solicitors to a Gift in a Batch

When your organization receives a gift due to the work of a solicitor, you can credit the solicitor on the gift record for the full or partial gift amount. To credit solicitors as you enter gifts in *Batch*, select **Gift, Solicitors** from the menu bar of the Data Entry screen. For more information about how to credit solicitors, see the *Gift Records Guide*.

► **Crediting a single solicitor with full credit for the gift**

Scenario: Today, you received a \$500 cash donation from John Smith for your 2005 Annual Fund. You are currently entering his gift in the batch, and would like to credit Max Taylor for making this donation possible. For more information about how to enter gifts in a batch, see “Adding gifts to the Data Entry grid” on page 135.

1. From a gift batch, add a gift of \$500 for John Smith as shown on the screen below. For more information about how to enter gifts into the batch, see “Adding Gifts in the Data Entry Grid” on page 134.

The screenshot shows a software window titled "Batch 49". It has a menu bar with "File", "Edit", "View", "Gift", "Constituent", "Favorites", "Tools", and "Help". Below the menu bar is a toolbar with various icons. The main area is a data entry grid with the following columns: "Constituent Name", "Amount", "Date", "Type", "Fund", "GL post date", and "t". The first row of the grid contains the following data: "John Smith", "\$500.00", "02/15/2005", "Cash", "2005 Annual Fund", "02/15/2005", and "t". The grid is otherwise empty. At the bottom of the window, there is a status bar with three sections: "Press F7 for search", "Gift 1 of 1", and "Running Total: £0.00".

Constituent Name	Amount	Date	Type	Fund	GL post date	t
John Smith	\$500.00	02/15/2005	Cash	2005 Annual Fund	02/15/2005	t

- From the Data Entry screen, select the gift row you added for John Smith.

Constituent Name	Amount	Date	Type	Fund	GL post date	
John Smith	\$500.00	02/15/2005	Cash	2005 Annual Fund	02/15/2005	No

Note: To search for a solicitor, you can click the binoculars that appear in the **Solicitor** field to use the drop-down arrow or press **F7** on your keyboard. The solicitor names listed in the drop-down list are the donor's assigned solicitors from the Relationships tab.

- From the menu bar, select **Gift, Solicitors**. The Solicitors Credited for this Gift screen appears.

Please enter the solicitors who should receive credit for this gift.

Gift amount: \$500.00 Enter by: ☒ Amount ☐ Percent

Solicitor	Amount
Taylor, Max	\$500.00

OK Cancel Distribute...

- Click in the first row of the **Solicitor** column. The drop-down arrow appears. Click the drop-down arrow to locate Max Taylor's name in the list. Because Max Taylor already exists as a solicitor, highlight Max's name. Max's name now appears in the first row of the **Solicitor** column.
- To advance to the **Amount** column, press **TAB** on your keyboard. The full amount of the gift defaults \$500 into the **Amount** column.
- Click **OK**. You return to the Data Entry screen of the gift batch.

Installment Information for Gifts in a Batch

Warning: If you add a payment to a pledge gift entered in the same batch, you will not see a separate row of gift information for the payment. An extra gift row does not appear in the batch, even after the batch has been committed.

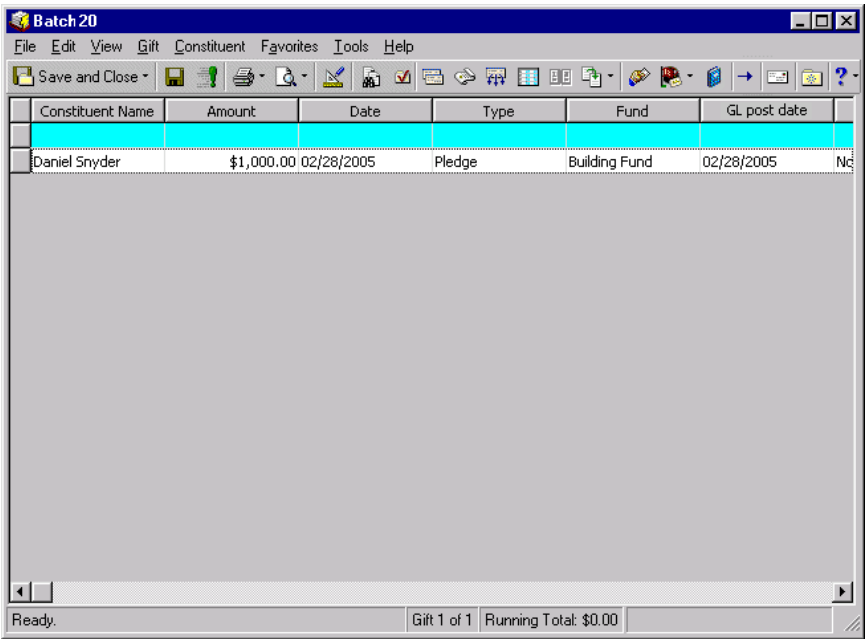
When you enter pledge gifts through *Batch*, you can select **Gift, Installment Information** from the menu bar of the Data Entry screen to set up a schedule for pledge installments. The **Installment Information** menu option is only enabled if you enter “Pledge” in the gift **Type** field of a batch. On the Pledge Installment Schedule screen, you can select the payment frequency, the number of installments, the date payments are due, and the date payments start.

If you already received the first pledge payment when you add a pledge gift record to the batch, you can apply the payment to the pledge before you commit the batch to the database. To add a payment for a pledge entered in the batch, select the gift row and select **Add Payment to Pledge** from the menu bar. For more information about pledge installments, see the *Gift Records Guide*.

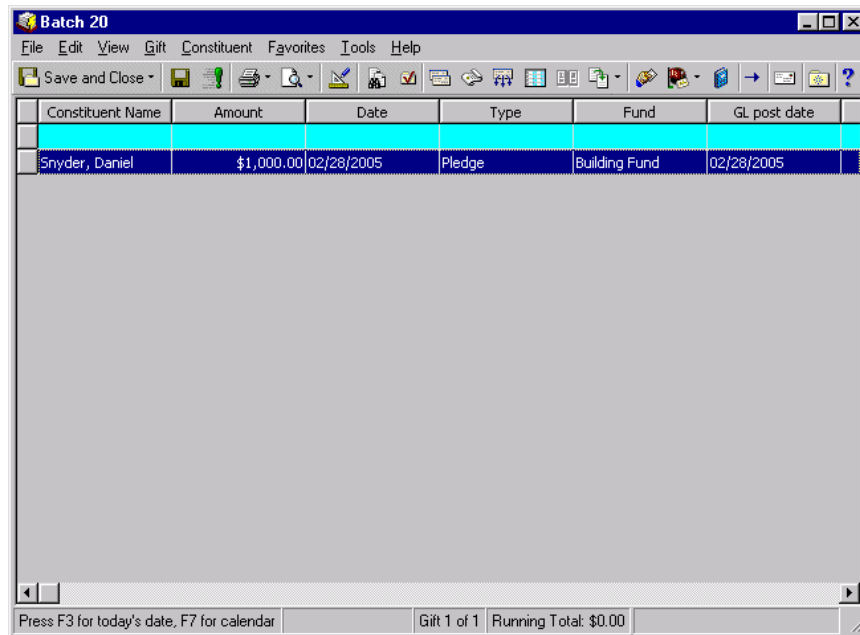
► **Scheduling a pledge**

Scenario: On 02/28/2005, Daniel Snyder called to pledge \$1,000 to your organization’s building fund. When you enter his pledge in the batch, you need to set up pledge installments for the pledge. For more information about how to enter gifts in a batch, see “Adding gifts to the Data Entry grid” on page 135.

1. From a gift batch, add a gift pledge of \$1,000 for Daniel Snyder as shown on the screen below. For more information about how to enter gifts into the batch, see “Adding Gifts in the Data Entry Grid” on page 134.



2. Select the gift row you added for Daniel Snyder.



Note: If you reschedule the entire installment for a pledge, **Update 'schedule' fields upon save** appears in the lower left corner of the New Schedule Results tab. To automatically update the fields on the Pledge Installment Schedule screen, mark this checkbox.

3. From the menu bar, select **Gift, Installment Information**. The Pledge Installment Schedule screen appears.

The screenshot shows a dialog box titled 'Pledge Installment Schedule for Mr. Daniel Roy Snyder'. It contains the following fields and options:

- Gift Amount: \$1,000.00
- Frequency: Monthly (selected from a dropdown)
- No. Installments: 10
- Day: ☐ Day ☐ of every ☐ month(s)
- ☒ The ☐ ☐ of every ☐ month(s)
 - First (selected from a dropdown)
 - Monday (selected from a dropdown)
 - of every 1 month(s) (entered in a text field)
- Starting on: 09/09/2005 (with a calendar icon)
- Installments due on the 1st Monday of every month
- Buttons: Distribute, Reschedule, OK, Cancel

On the right side of the dialog, there is a table showing the installment schedule:

Date	Amount
10/3/2005	\$100.
11/7/2005	\$100.
12/5/2005	\$100.
1/2/2006	\$100.

4. In the **Frequency** field, select "Monthly".
5. In the **No. Installments** field, enter "10". Daniel Snyder pays the pledge in ten installments.
6. Mark **The [] [] of every [] month(s)**. Daniel Snyder pledges to make a \$100 payment on the first Monday of every month for the next ten months.
7. In the first field of **The [] [] of every [] month(s)** option, select "First".
8. In the second field of **The [] [] of every [] month(s)** option, select "Monday".
9. In the last field of **The [] [] of every [] month(s)** option, enter "1". The option now reads **The First Monday of every 1 month(s)**.
10. In the **Starting on field**, enter the date 09/09/2005. Because you schedule the payment on the first Monday of every month, the first payment is due 10/03/2005.

11. To update the installment schedule in the grid, click **Distribute**. The Pledge Installment schedule grid displays the date and amount of each pledge payment. Because Daniel Snyder pays the pledge in ten installments, the grid displays ten \$100 payments that begin on 10/03/2005.
12. Click **OK**. You return to the Data Entry screen of the batch.

Adding a Payment to a Pledge in a Gift Batch

Tip: To add a payment to a pledge, you can also press **CTRL + D** on your keyboard.

To add a payment to a pledge in a batch, select **Gift, Add Payment to Pledge** from the menu bar of a gift batch. Once you enter “Pledge” in the **Type** field of a gift row, the **Add Payment to Pledge** option appears in the **Gift** menu. As long as “Pledge” is selected in the **Type** field, you can select any form of payment for the pledge.

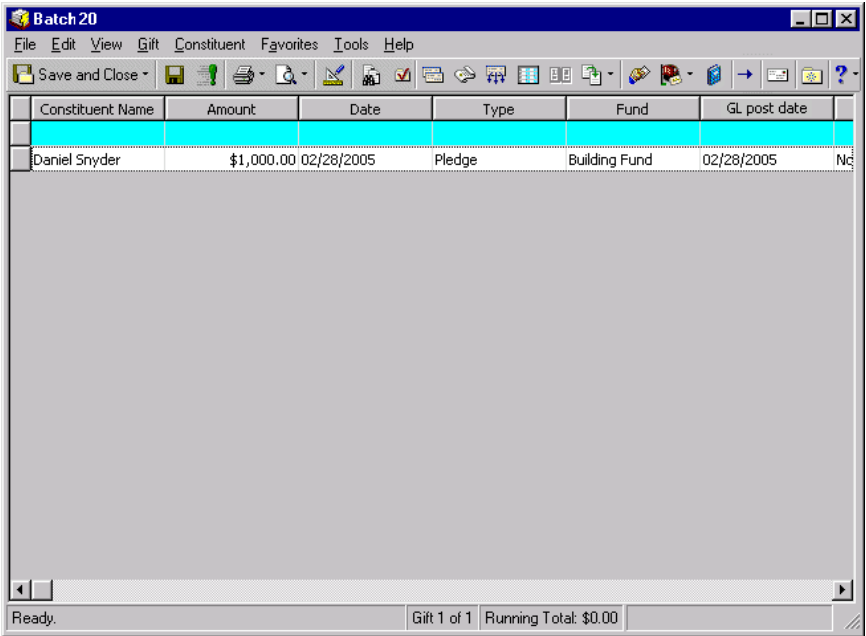
We recommend you set the outstanding pledge business rule. When you set this business rule and add a gift for a constituent with an outstanding pledge, a message appears to remind you the gift may be a payment toward the pledge. For more information about pledges, see the *Gift Records Guide*.

► Adding a payment to a pledge

Scenario: On 02/28/2005, Daniel Snyder called to pledge \$1,000 to your organization’s building fund. Because Daniel will be out of town for the next month, he delivers a \$100 check to your office that afternoon to cover his first installment. To enter the \$100 payment for Daniel, click on his gift row in the batch and select **Gift, Add Payment to Pledge** from the menu bar. For more information about how to enter gifts in a batch, see “Adding gifts to the Data Entry grid” on page 135.

Warning: If you add a payment to a pledge gift entered in the same batch, you will not see a separate row of gift information for the payment until the batch is committed.

1. From a gift batch, add a gift pledge of \$1,000 for Daniel Snyder as shown on the screen below. For more information about how to enter gifts into the batch, see “Adding Gifts in the Data Entry Grid” on page 134.



2. Select the gift row you added for Daniel Snyder.

The screenshot shows a window titled "Batch 20" with a menu bar (File, Edit, View, Gift, Constituent, Favorites, Tools, Help) and a toolbar. Below the toolbar is a table with the following data:

Constituent Name	Amount	Date	Type	Fund	GL post date
Snyder, Daniel	\$1,000.00	02/28/2005	Pledge	Building Fund	02/28/2005

At the bottom of the window, there is a status bar with the text: "Press F3 for today's date, F7 for calendar", "Gift 1 of 1", and "Running Total: \$0.00".

3. From the menu bar, select **Gift, Add Payment to Pledge**. The Pledges(s) Paid by this Gift screen appears.

The screenshot shows a window titled "Pledge(s) Paid by this Gift" with a close button (X). The window contains the following elements:

- Instruction: "Pay outstanding pledges by selecting the pledge you wish to pay and then entering the amount to apply."
- Payment amount: A text field containing "\$100.00" and an "Auto-Distribute" button.
- Checkbox: "Show zero amount pledges" (unchecked).
- Table with the following data:

Pay?	Date	Type	Fund	Reference	Pledge Amount	Pledge Balance	Amount Applied	Con
<input checked="" type="checkbox"/>	02/28/2...	Pledge	Building ...		\$1,000.00	\$1,000.00	\$100.00	Mr. Daniel
- Buttons: "View Installments..." and "OK", "Cancel".
- Summary: "Applied: \$100.00" and "Remaining: \$0.00".

Note: In *The Raiser's Edge*, you can use the **Convert Pledges to Recurring Gifts** link from the Administration page to convert existing pledges to recurring gifts. For more information about how to convert and possible exceptions during this process, see the Recurring Gifts chapter of the *Gift Records Guide*.

4. In the **Payment Amount** field, enter the amount \$100. This is the amount Daniel Snyder pays for his first installment.
5. Mark the checkbox in the **Pay?** column for Daniel's \$1,000 pledge entered in this batch.
If a constituent has many pledges, the **Pay?** column specifies which pledge you apply a payment towards.
6. To automatically apply the gift to Daniel Snyder's gift record, click **Auto-Distribute**.
The payment amount is automatically distributed in the **Amount Applied** column. For this example, \$100 is applied to Daniel's \$1,000 pledge gift.

Applying a Payment to a Pledge in a Gift Batch

To apply a payment to a pledge through *Batch*, select **Gift, Apply to, Pledge** from the menu bar of a gift batch. It is important to note the difference between adding a payment to a pledge explained in “Adding a payment to a pledge” on page 164, and applying a payment to a pledge.

When you add a payment to a pledge, you must select “Pledge” in the **Type** field of a gift row. When you select **Gift, Add Payment to Pledge** from the menu bar of a gift batch, you add a payment to the pledge you currently enter in the same gift row.

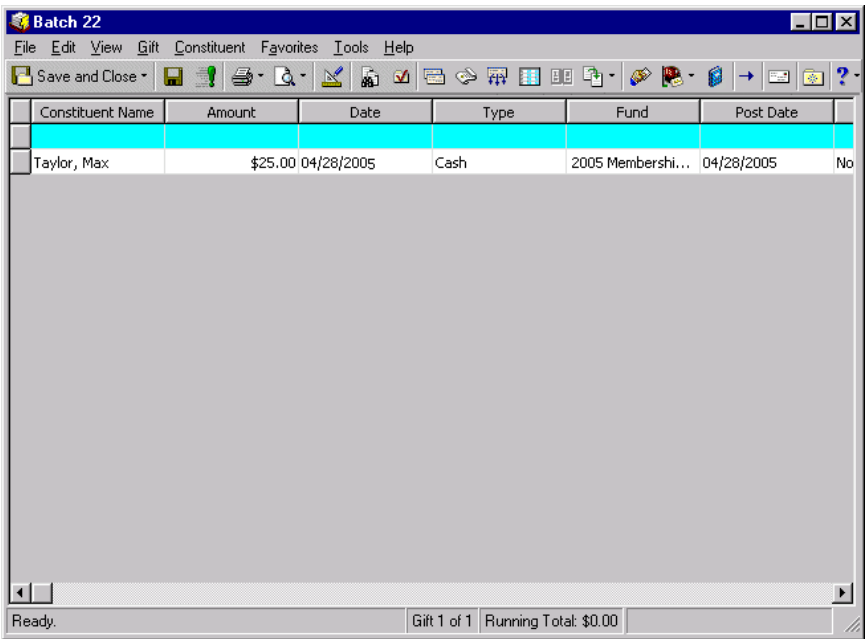
When you apply a payment to a pledge, you can enter any type of gift in the **Type** field of a gift row to pay toward a pledge. You can also select the pledge to which you apply the new payment. For example, you enter a gift in a batch for Max Taylor. He applies a cash gift of \$100 toward his pledge to the Building Fund. In the **Type** field, you enter “Cash”. Once you enter “Cash” in the **Type** field, you can select **Gift, Apply to Pledge** from the menu bar of the gift batch. From the Apply Gift to Pledge(s) screen, you can select the pledge to which to apply the payment. When a payment amount for a pledge is greater than the balance due for a pledge, you can create a separate cash gift for the remaining overpayment amount. For more information about how to create separate cash gifts for overpayments of pledges, see “Creating Cash Gifts for Pledge Overpayments” on page 169.

We recommend you set the outstanding pledge business rule. When you set this business rule and add a gift for a constituent with an outstanding pledge, a message appears to remind you the gift may be a payment toward the pledge. For more information about pledges, see the *Configuration & Security Guide*.

▶ Applying a payment to a pledge in a batch

Scenario: On 04/28/2005, Max Taylor sends you a cash gift of \$25 for his pledge to your organization’s 2005 Membership Fund. To enter the \$25 payment for Max, click on his gift row in the batch and select **Gift, Apply to, Pledge** from the menu bar. For more information about how to enter gifts in a batch, see “Adding gifts to the Data Entry grid” on page 135.

1. From a gift batch, add a cash gift of \$25 for Max Taylor as shown on the screen below. For more information about how to enter gifts into the batch, see “Adding Gifts in the Data Entry Grid” on page 134.



2. From the Data Entry screen, select the gift row you added for Max Taylor.

Tip: To access the Apply Gift to Pledge (s) screen, you can also press **CTRL + Y** on your keyboard.

- From the menu bar, select **Gift, Apply to, Pledge**. The Apply Gift to Pledge(s) screen appears.

Pay?	Date	Type	Fund	Reference	Pledge Amount	Pledge Balance	Amount Applied	Con
<input type="checkbox"/>	01/15/1...	Pledge	Acquisiti...		\$800.00	\$200.00		Mr. Max G
<input checked="" type="checkbox"/>	05/01/2...	Pledge	2000 Me...		\$750.00	\$750.00	\$25.00	Mr. Max G

- In the **Payment Amount** field, enter the amount \$25. This is the amount Max Taylor pays toward the 2005 Membership fund pledge.
- Mark the checkbox in the **Pay?** column for Max's \$750 pledge to the 2005 Membership Fund.
- To automatically apply the gift to Max Taylor's gift record, click **Auto-Distribute**.
The payment amount is automatically distributed in the **Amount Applied** column. For this example, \$25 is applied to Max's \$750 pledge gift.
- Click **OK**. The \$25 payment is now added to Max Taylor's Membership fund pledge. You return to the Data Entry screen of the batch.

To add Max's cash payment to the database, you need to commit the gift batch. For more information about how to commit batches to the database, see "Committing a Batch" on page 203.

Applying a Payment to a Recurring Gift in a Gift Batch

Note: In *The Raiser's Edge*, you can convert existing pledges to recurring gifts using the **Convert Pledges to Recurring Gifts** link from the Administration page. For more information about how to convert and possible exceptions during this process, see the Recurring Gifts chapter of the *Gift Records Guide*.

You can also apply a payment to a recurring gift in a gift batch. When you apply a payment to a recurring gift, you must enter "Cash" in the **Type** field of a gift row to pay toward a recurring gift. Only cash payments can be applied to recurring gifts. You can also select the recurring gift to which you apply the new payment. For example, you enter a gift in a batch for Mark Adamson. He applies a cash gift of \$50 toward his recurring gift to the Acquisition Fund. In the **Type** field, you would enter "Cash". After you enter "Cash" in the **Type** field, you can select **Gift, Apply to Recurring Gift** from the menu bar of the gift batch. From the Recurring Gift screen, you can select the recurring gift to which you want to apply the payment.

We recommend you set the outstanding recurring gifts business rule. When you set this business rule and add a gift for a constituent with an outstanding recurring gift, a message appears to remind you the gift may be a payment toward the recurring gift. For more information about recurring gifts, see the *Gift Records Guide*.

► Applying a payment to a recurring gift in a batch

Scenario: On 11/18/2005, Mark Adamson sends you a cash gift of \$100 as a payment toward his recurring gift to your organization's 2005 Annual Fund. To enter the \$100 payment for Mark, click on his gift row in the batch and select **Gift, Apply to, Recurring Gift** from the menu bar. For more information about how to enter gifts in a batch, see "Adding gifts to the Data Entry grid" on page 135.

1. From a gift batch, add a cash gift of \$100 for Mark Adamson as shown on the screen below. For more information about how to enter gifts into the batch, see "Adding Gifts in the Data Entry Grid" on page 134.

The screenshot shows a window titled "Batch 25" with a menu bar (File, Edit, View, Gift, Constituent, Favorites, Tools, Help) and a toolbar. Below the toolbar is a table with the following data:

Constituent Name	Amount	Date	Type	Fund	Post Date
Adamson, Mark	\$100.00	11/18/2005	Cash	2005 Annual Fund	11/18/2005

At the bottom of the window, there is a status bar that reads: "Press F3 for today's date, F7 for calendar" and "Gift 1 of 1 Running Total: \$0.00".

2. From the Data Entry screen, click in the gift row you added for Mark Adamson.
3. From the menu bar, select **Gift, Apply to, Recurring Gift**. The Recurring Gift screen appears.

The screenshot shows a dialog box titled "Recurring Gift(s) Paid by this Gift" with a close button (X). The text inside says: "Pay an outstanding recurring gift by selecting the recurring gift you wish to pay." Below this is a "Transaction amount:" field with the value "\$100.00" and a checkbox labeled "Show zero amount recurring gifts" which is unchecked. Below the checkbox is a table with the following data:

Pay?	Date	Fund	Frequency	Next Trans Due	Next Trans Amount	Reference
<input checked="" type="checkbox"/>	11/18/2...	2003 Annual Fund	Monthly	11/18/2003	\$100.00	

At the bottom of the dialog box, there is a "View Installments..." button and "OK" and "Cancel" buttons.

4. In the **Transaction amount** field, enter the amount \$100. This is the amount Mark pays toward the 2005 Annual Fund recurring gift.
5. Mark the checkbox in the **Pay?** column for Mark's recurring gift to the 2005 Annual Fund.

- Click **OK**. The \$100 payment is added to Mark Adamson's 2005 Annual Fund recurring gift. You return to the Data Entry screen of the batch.

To add Mark's cash payment to the database, you must commit the gift batch. For more information about how to commit batches to the database, see "Committing a Batch" on page 203.

Creating Cash Gifts for Pledge Overpayments

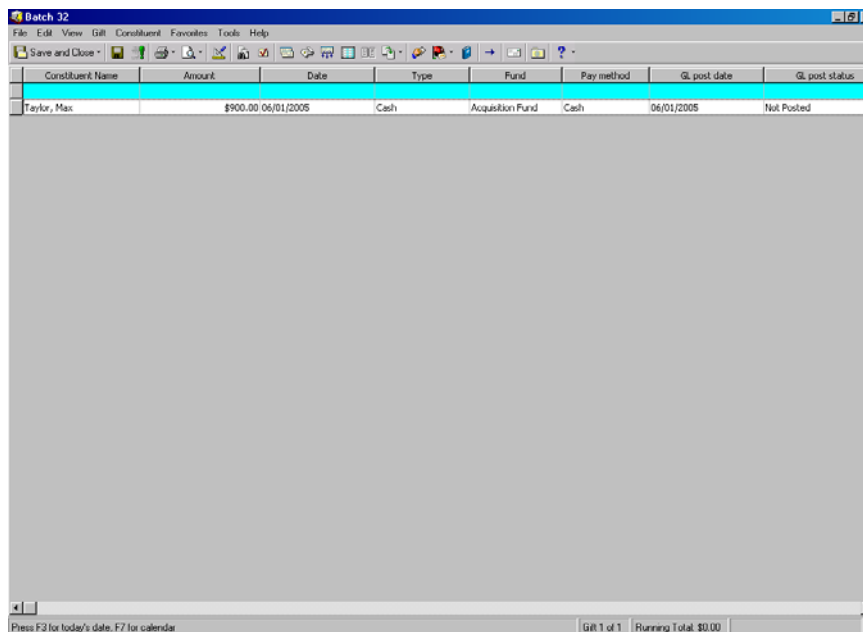
When a gift overpays a pledge, a screen appears and prompts you to select what to do with the extra gift amount. You can change the gift amount to equal the applied amount, select to increase the amount of the original pledge, or create a separate cash gift.

When you select to create a cash gift for the remainder of the overpayment, a separate cash gift is created for the extra amount. For example, John Smith sends your organization a cash gift of \$200 for his pledge to your organization's 2005 Building Fund. However, his pledge balance is only \$100. You can apply John's payment and create a separate cash gift for the remaining \$100. Once you create the cash gift, you can select **Gift, View Overpayment Amount** from the menu bar to view the "overpayment" amount for John's gift in the batch. For more information about how to view overpayments, see "Viewing Overpayment Amount" on page 170.

► Creating a cash gift for a pledge overpayment

Scenario: On 06/01/2005, Max Taylor sends you a cash gift of \$900 for his pledge to your organization's Acquisition Fund. To enter the \$900 payment for Max, click on his gift row in the batch and select **Gift, Apply to, Pledge** from the menu bar. Max's pledge balance is only \$200. Therefore, you must apply the payment to his pledge and create a cash gift for the rest of the gift.

- From a gift batch, add a cash gift of \$900 for Max Taylor as shown on the screen below. For more information about how to enter gifts into the batch, see "Adding Gifts in the Data Entry Grid" on page 134.



- From the Data Entry screen, select the gift row you added for Max Taylor.

3. From the menu bar, select **Gift, Apply to, Pledge**. The Apply Gift to Pledge(s) screen appears.

Pay?	Date	Type	Fund	Reference	Pledge Amount	Pledge Balance
<input type="checkbox"/>	06/01/2005	Pledge	2005 Annual Fund		\$1,000.00	\$1,000.00
<input type="checkbox"/>	05/01/2005	Pledge	2005 Membership Fund		\$750.00	\$750.00
<input checked="" type="checkbox"/>	01/15/2005	Pledge	Acquisition Fund		\$800.00	\$200.00

4. In the **Payment amount** field, enter the amount \$900. This is the amount Max Taylor pays toward the Acquisition Fund pledge.
5. Mark the checkbox in the **Pay?** column for Max's \$800 pledge to the Acquisition Fund.
6. To automatically apply the gift to Max Taylor's gift record, click **Auto-Distribute**.
The payment amount is automatically distributed in the **Amount Applied** column. For this example, \$200 is applied to Max's \$800 pledge gift.
7. Click **OK**. A message appears to tell you the total amount applied does not equal the payment amount.

The total amount applied (\$200.00) does not equal the payment amount (\$900.00). Do you wish to update the payment amount to \$200.00?

8. Click **Yes**. You want to update the payment amount and create a cash gift for the rest of the Max's gift. A message appears to ask you to specify what to do with the rest of Max's gift of \$700.

The payment amount (\$200.00) is less than the gift amount (\$900.00). Please specify what the system should do with the remaining balance (\$700.00).

☒ Create a Cash gift for the remainder
☐ Change the gift amount to be equal to the payment amount (\$200.00)
☐ Increase the amount of the original pledge to \$1,500.00.

9. Mark **Create a cash gift for the remainder**. You want to create a separate cash gift for the \$700. However, another gift row in the batch will not be created.
10. Click **OK**. You can now view your cash gift amount. For more information about how to view overpayment amounts, see "Viewing Overpayment Amount" on page 170.

Viewing Overpayment Amount

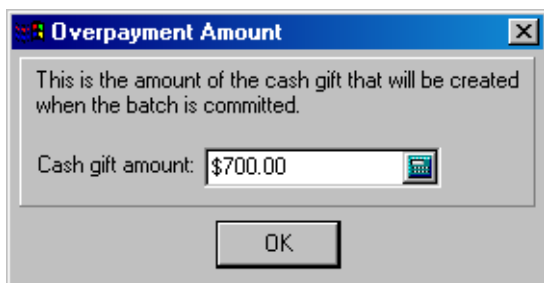
From the Data Entry grid for a gift batch, you can view the overpayment amount for a pledge. For example, John Smith sends your organization a cash gift of \$200 for his pledge to your organization's 2005 Building Fund. However, his payment due is only \$100. You can apply John's payment and view the "overpayment" amount for John's gift in the batch.

To view the overpayment amount, select **Gift, View Overpayment Amount** from the menu bar of a gift batch. This option is only available when a cash gift overpays a pledge and a cash gift has already been created for the overpayment. For more information about how to create cash gifts for pledge overpayments, see “Creating Cash Gifts for Pledge Overpayments” on page 169.

► **Viewing overpayment amount for a pledge**

Note: The option to view overpayment amounts for a pledge is only enabled when a cash gift is overpaying a pledge.

1. From the Data Entry screen of a gift batch, select **Gift, View Overpayment Amount** from the menu bar. The Overpayment amount screen appears. For more information about how to enter gifts into the batch, see “Adding Gifts in the Data Entry Grid” on page 134.



The **Cash gift amount** field shows the cash gift amount created as a result of the pledge overpayment. This field is for viewing only.

2. When you finish viewing the screen, click **OK**. You return to the Data Entry screen of the gift batch.

Entering and Selling Stock in a Gift Batch

When you receive stock/property gifts from your constituents, you can easily enter the new stock/property gift and the sold stock information for the gift in the same batch row. For example, if you receive 50 shares of stock from Davis Engineering Company, you can enter the gift amount, the amount of shares, the price per share, and a fund to which to apply the gift. In the same batch row, you can enter sold stock information such as the date you sold the stock and the broker fee. You cannot, however, sell existing stock/property gifts in a batch row. You must continue to work with selling existing stock/property through the gift record. For more information about how to sell existing stock/property, see the *Gift Records Guide*.

► **Entering and selling stock in a gift batch**

Scenario: On 01/06/2005, Toy World, Inc. sends you a stock/property gift of 10 shares of stock in its own company. Each share is worth \$100. The company sends you the gift for your organization's Building Fund. Your organization immediately sells the stock at \$100 per share. Now, you must enter the new stock/property gift information in a batch row as well as the sold stock information. Add the appropriate stock fields to a batch row and enter the related gift information.

1. From the Gift Batch Setup screen for a gift batch, select the Fields tab. The Fields tab appears. For more information about how to enter gifts into the batch, see "Adding Gifts in the Data Entry Grid" on page 134.

Gift Batch Setup

1:Batch Header 2:Fields 3:Defaults

Select the fields to be used for data entry in this batch.

Gift fields:

- Gift Fields
 - Acknowledge
 - Acknowledge date
 - Amount
 - Amount bills
 - Amount coins
 - Anonymous
 - Appeal
 - Authorization code
 - Bank
 - Campaign
 - Cardholder name
 - Check date
 - Check number
 - Constituent Code
 - Constituent ID
 - Constituent Name

Data entry fields:

- Constituent Name
- Amount
- Date
- Type
- Fund
- GL post date
- GL post status
- Issuer
- Issuer symbol
- Issuer number of units
- Issuer median price
- Sale of stock date
- Sale of stock amount
- Sale of stock broker fee
- Sale of stock GL post date
- Sale of stock GL post status

Find... Load from Existing Batch...

< Back Next > Cancel Save Data Entry

2. In the **Gift fields** box, select the **Issuer** field and click the right arrow once to move it to the **Data entry fields** box.
3. Use the same method above to select these fields and move them to the **Data entry fields** box:
 - Issuer symbol
 - Issuer number of units
 - Issuer median price
 - Sale of stock date
 - Sale of stock amount
 - Sale of stock broker fee
 - Sale of stock GL post date
 - Sale of stock GL post status

4. Click **Data Entry**. The Data Entry screen appears.

Constituent Name	Amount	Date	Type	Fund	GL post date	GL post status	Issuer	Issuer symbol	Issue
Toy World, Inc.	\$1,000.00	01/06/2005	Stock/Property	Building Fund	01/06/2005	Not Posted	Toy World, Inc.	ToyW	

5. In the **Constituent Name** field, click the binoculars to search for Toy World, Inc. The Open screen appears.
6. In the **Last/Org name** field, enter “Toy World, Inc.” and click **Find Now**. For more information about how to search for records, see the *Constituent Data Entry Guide*. If the search criteria you entered matches a constituent in the database, it lists in the grid on the screen. Depending on how limited or detailed your criteria are, the program may find one or many records.

7. Click **Open**. You return to the Data Entry screen. “Toy World, Inc.” appears in the **Constituent Name** field.
8. In the **Amount** field, enter the amount \$1,000. This is the amount of the stock/property gift.
9. In the **Date** field, enter the date 01/06/2005. This is the gift date.
10. In the **Type** field, select “Stock/Property”. This is a gift of stock.
11. In the **Fund** field, select “Building Fund”. This gift is for the Building Fund.

12. In the **GL post date** field, enter today's date and in the **GL post status** field, select "Not Posted".
13. In the **Issuer** field, enter "Toy World, Inc.". Toy World, Inc. gave your organization stock in its own company.
14. In the **Issuer symbol** field, enter "ToyW". This is the symbol for Toy World, Inc.
15. In the **Issuer number of units** field, enter "10". Toy World, Inc. donated 10 shares of stock.

Issuer number of units	Issuer median price	Sale of stock date	Sale of stock amount	Sale of stock broker fee	Sale of stock GL post date	Sale of stock G
10	\$100.00	01/06/2005	\$1,000.00	\$0.00	01/06/2005	Not Posted

16. In the **Issuer median price** field, enter the amount \$100. Each share is worth \$100.
17. In the **Sale of stock date** field, enter the date 01/06/2005. This is the date you sold the stock.
18. In the **Sale of stock amount** field, enter the amount \$1,000. This is the total amount for which the stock sold.
19. In the **Sale of stock GL post date** field, enter today's date and in the **Sale of stock GL post status** field, select "Not Posted".
20. To save the batch, click **Save and Close** on the toolbar.

Linking a Gift to a Membership in a Gift Batch

Tip: To access the Link Gift to Membership screen, you can also press **CTRL + R** on your keyboard.

On the Link Gift to Membership screen, you can link a gift you added in a batch to an existing membership. From this screen, you can also add a new membership and link a gift to the new membership at the same time. To access the Link Gift to Membership screen, select **Gift, Links, Membership** from the menu bar of the Data Entry screen. For more information about how to add and link to memberships in *Batch*, see the *Membership Gifts Guide*.

Link Gift to Membership

Link memberships to this gift by selecting the membership and then choosing the appropriate option from the transaction bar. You may also link to the selected transaction by checking the Link column.

Gift amount: \$100.00

New Membership - Open Renew Rejoin Upgrade during cycle Downgrade during cycle

Link?	Transa...	Category	Amount Applied	Expires On	Program	Subcategory	Standing
<input type="checkbox"/>	Renewal	Contributor	\$100.00	11/30/2004	Adopt an Animal	Tiger	Active
<input checked="" type="checkbox"/>	Joined	Young Ma...	\$100.00	11/27/2002	Young Explorers		Active

View Transaction History Load Memberships From...

Applied to Events: \$0.00 Available to Apply: \$0.00 Total Applied: \$100.00

OK Cancel

Linking a Gift to an Event in a Gift Batch

Tip: From the Pay Registration Fees screen, the New Donation screen, or the New Sponsoring Pledge screen, you can press **ALT + N** on your keyboard to access the Open screen for an event.

When you select **Gift, Links, Events**, you can select from three **Event** options. The three **Event** options are **Registration Fees**, **Other Donations**, and **Sponsoring Pledges**. The Pay Registration Fees screen, New Donation screen, and New Sponsoring Pledge screen are very similar. From these screens you can link gifts and add new registrations, donations, and sponsoring pledges. The picture below is of the New Sponsoring Pledge screen. For more information about how to link gifts for **Event** options in *Batch*, see the *Event Gifts Guide*.

New Sponsoring Pledge

You may indicate which participant to sponsor with this sponsoring pledge by selecting 'Link?' next to the appropriate participant registration. The entire amount of this pledge will be applied. Selecting 'Load Registrations From...' will add registration information for other participants to the list. You may select 'New Registration' in order to add a new participant to an event.

Gift amount: \$100.00

New Registration New Registration for Grouped Event Open Participant

Link?	Event ID	Date	Participant	Status	Attended	Constituent
<input type="checkbox"/>	Fire Prevention		Orla A. McGrann	Complimentary	<input type="checkbox"/>	Orla A. McGrann
<input checked="" type="checkbox"/>	Volunteer Dinner	12/17/2005	Orla A. McGrann	Complimentary	<input type="checkbox"/>	Orla A. McGrann
<input type="checkbox"/>	CPR Training Session		Orla A. McGrann	Complimentary	<input type="checkbox"/>	Orla A. McGrann

Load Registrations From...

OK Cancel

Linking a Gift to a Proposal in a Gift Batch

Tip: From the Link Gift to Proposal screen, you can press **ALT + N** on your keyboard to access the New Proposal screen, and **ALT + O** to open an existing proposal.

On the Link Gift to Proposal screen, you can link a gift you added in a batch to a proposal. From this screen, you can also add a new proposal and link a gift to the new proposal at the same time. To access the screen, select **Gift, Links, Proposal** from the menu bar of the Data Entry screen. For more information about how to add and link to proposals in *Batch*, see the *Proposal Gifts Guide*.

Link Gift to Proposal

Link proposals to this gift by selecting the proposal and choosing 'Link?'

Gift amount: \$100.00

New Proposal Open Proposal Find...

Link?	Name	Purpose	Campaign	Fund	Amount Applied	Constituent
<input checked="" type="checkbox"/>	Scholarship...	Research E...	Scholarship Camp...	Smith-Brown Sch...		Sean A. Daven...

Load Proposals From...

Available to Apply: \$100.00 Total Applied: \$0.00

OK Cancel

Go To Option in a Batch

The **Go To** option in *Batch* is a convenient way to go directly to another record without having to open the record from another area of the program and without having to close out of *Batch*. Such records include constituent records, fund records, and campaign records. For example, when you click in the gift row for Max Taylor and select **Gift, Go To, Constituent** from the menu bar of a gift batch, you go directly to Max Taylor's constituent record. When you finish viewing or making changes to the constituent record, you can close the record and immediately return to the gift batch you are working in.

Depending on what fields and other information you have entered in a gift row of a batch, your Go To menu can contain several options. For more information about the Go To option, see the *Program Basics Guide*.

Batch 11

File Edit View Gift Constituent Favorites Tools Help

Save and Close Match... Ctrl+M

Constituent N Tribute... Ctrl+B

Soft Credit...

Split Gift...

Benefits...

Solicitors...

Installment Information Ctrl+I

Add Payment to Pledge Ctrl+D

View Overpayment Amount

Apply to

Links

Go To

Currency Exchange

Gift Properties... Ctrl+G

Acknowledgement History Ctrl+K

GL Distribution

1 Constituent (Max G. Taylor)

2 Acquisition Fund

Type	Fund	GL post date	No
ledge	Acquisition Fund	08/25/2005	No

Gift 1 of 2 Running Total: \$100.00

Currency Exchange in a Batch

You can view or change the currency exchange information for a batch by selecting **Gift, Currency Exchange** from the menu bar of a gift batch. From the screen, you can set the **Currency type** and **Exchange rate** for a batch. For more information about how to set currency exchange information in a batch, see the *Configuration & Security Guide*.

	Dollars (USA)	Yen (JAP)
Gift Amount	\$500.00	0¥
Receipt Amount	\$500.00	0¥

Acknowledgement History for Gifts in a Batch

When you add gifts in a batch, you can select **Gift, Acknowledgement History** from the menu bar of a gift batch to view a constituent's acknowledgement history. When you select **Gift, Acknowledgement History** from the menu bar, the Letters Sent screen appears where you can view the type of acknowledgement letter sent to a constituent, the date you sent the letter, and the gift type and gift date. For more information about acknowledgement letters, see the *Mail Guide*.


Letter code	Sent on	Gift type	Gift date	Constituent
Capital Campaign Thank You	06/06/2005	Cash	06/06/2005	Max Taylor
Annual Giving Thank You	02/04/2003	Cash	02/04/2003	Max Taylor
Personalized Thank You	11/15/2002	Cash	11/15/2002	Max Taylor
Membership Letter	04/22/2002	Cash	04/20/2002	Max Taylor

GL distribution for Gifts in a Batch



Warning: When you are ready to post a batch to **General Ledger**, depending on your security rights to the **GL post status** field, some of your gifts in the batch may not post. Security settings will take effect once you try to post. If you do not have rights to the **GL post status** field for certain gifts, once you try to post to **General Ledger**, some gifts may post and some gifts may create exceptions. For more information about security settings, see the *Configuration & Security Guide*.

In *The Raiser's Edge*, you can post gifts to Blackbaud's **General Ledger**. With this option, you can create a file that consists of the gift transactions to post. You can use the **Post to General Ledger** option in *Administration* to move this file into the fund accounting software. From a gift batch, you can select **Gift, GL Distribution** from the menu bar of a gift batch to view gifts posted to **General Ledger**.

GL Distribution

Gift amount: \$100.00  Display by: ☒ Amount ☐ Percent

GL Gift Type	Debit Account No.	Credit Account No.	Amount
Cash	01-111100-00-00	01-413050-00-02	\$100.00

 Find... 

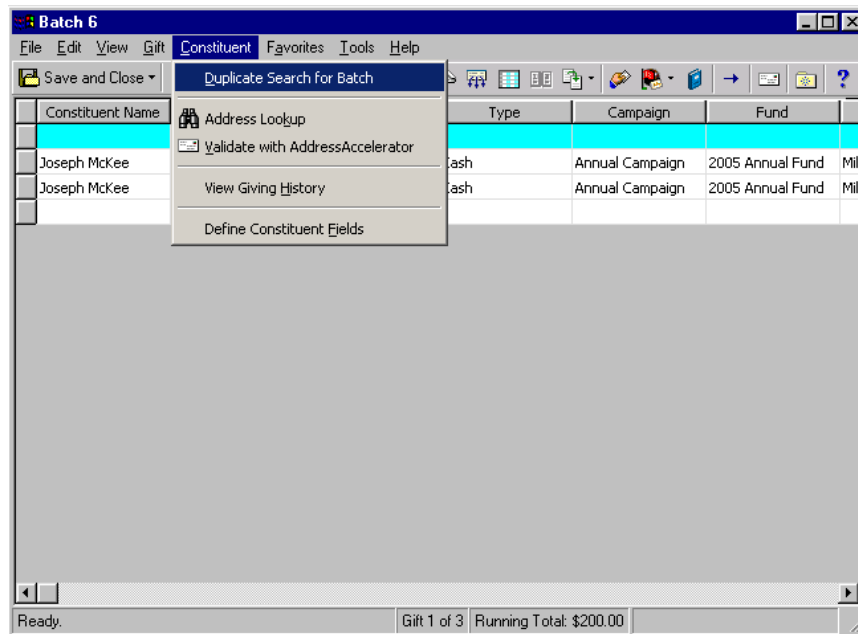
On the GL Distribution screen, you can view the **GL Gift Type**, **Debit Account No.**, **Credit Account No.**, and **Amount** information. For more information about how to post to **General Ledger**, see the *Gift Records Guide*.

Searching for Duplicate Gifts in a Batch

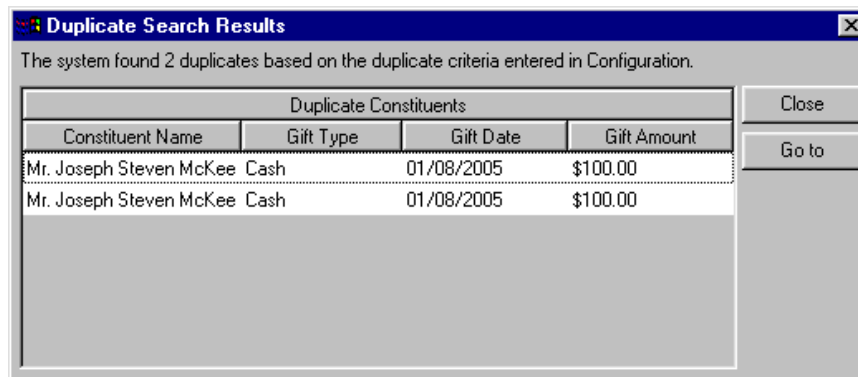
When you select the **Duplicate Search for Batch** menu option, the program searches for duplicate entries in the batch based on the duplicate search criteria specified in *Configuration*. For example, if you accidentally enter two identical gifts for the same constituent in a batch, the **Duplicate Search for Batch** option warns you that duplicate entries exist within the batch. If any duplicates are found, the Duplicate Search Results screen appears and displays information about possible duplicate gifts.

► **Searching for duplicate gifts in a batch**

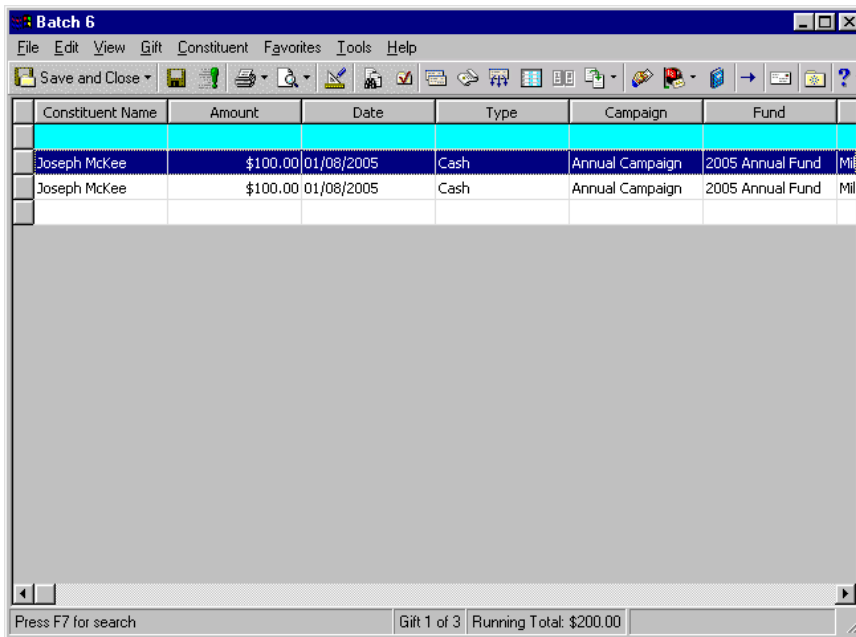
1. From the Data Entry screen of a gift batch, select **Constituent, Duplicate Search for Batch** from the menu bar. For more information about how to open a gift batch, see “Accessing a Gift Batch” on page 79.



2. If the batch does not contain duplicate gifts, the message “No duplicates found” appears. If duplicate gifts exist in the batch, the Duplicate Search Results screen appears.



3. To find the duplicate entry in the batch, select an entry in the Duplicate Constituents grid and click **Go to**. The Data Entry screen appears with the duplicate entry highlighted.



If the entry duplicates another gift record in the batch, delete the row from the batch. For more information about how to delete a row in a batch, see “Deleting a row in the batch” on page 144.

Accessing and Correcting Addresses for Constituents through a Gift Batch

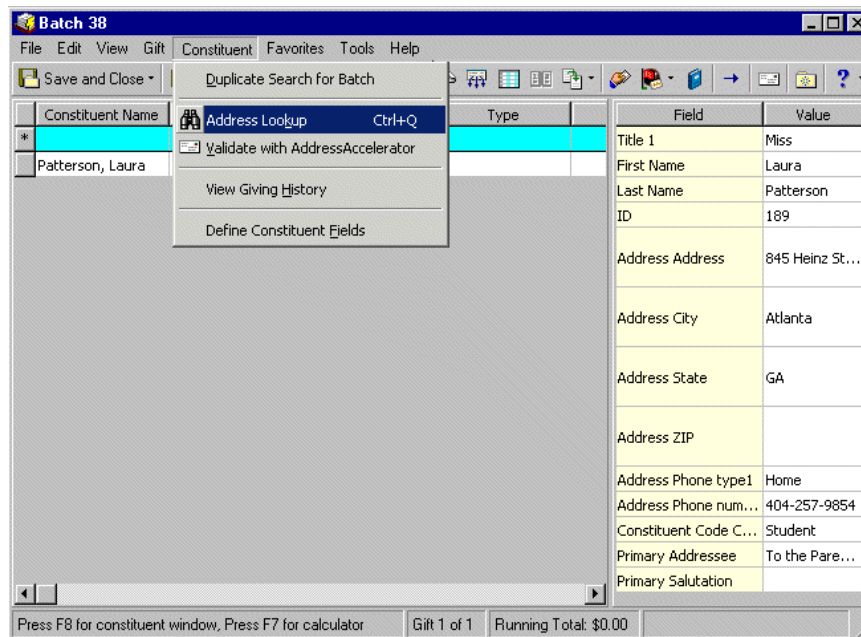
Note: Before you use the **Address Lookup** or **Validate with AddressAccelerator** menu options in *Batch*, make sure your *AddressAccelerator* data files are installed and linked correctly in User Options. For more information about how to set up these user options, press **F1** on any *AddressAccelerator* screen to access the help file.

When you have the address correction service *AddressAccelerator*, you can search for the city, state, and ZIP Code for a constituent’s address on the Address Lookup screen. To look up and correct address information, you must work from the Constituent Window for a particular constituent. To view the Constituent Window, select **View, Constituent Window** from the menu bar. To update a constituent’s address in *Batch*, you can also select **Constituent, Validate with AddressAccelerator** from the menu bar of a gift batch. For more information about *AddressAccelerator*, press **F1** on any *AddressAccelerator* screen to access the help file.

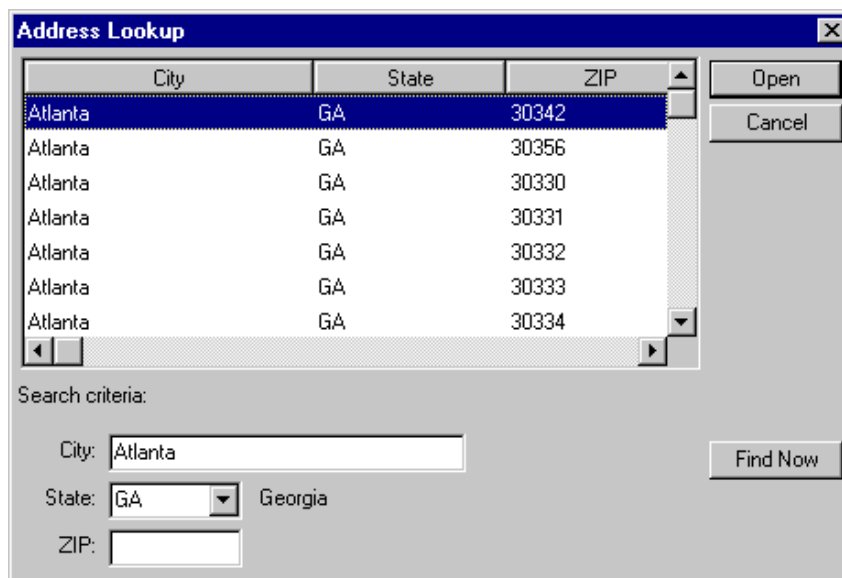
► Looking up an address for a constituent

Note: You can use shortcut keys to move around *The Raiser’s Edge* without the use of your mouse. For example, to access the Address Lookup screen for a batch, press **CTRL + Q** on your keyboard.

1. From a gift batch, put your cursor in any address field in the Constituent Window for which you want to find an address, and select **Constituent, Address Lookup** from the menu bar. For more information about how to enter gift information into a batch, see “Adding Gifts in the Data Entry Grid” on page 134.



The Address Lookup screen appears.



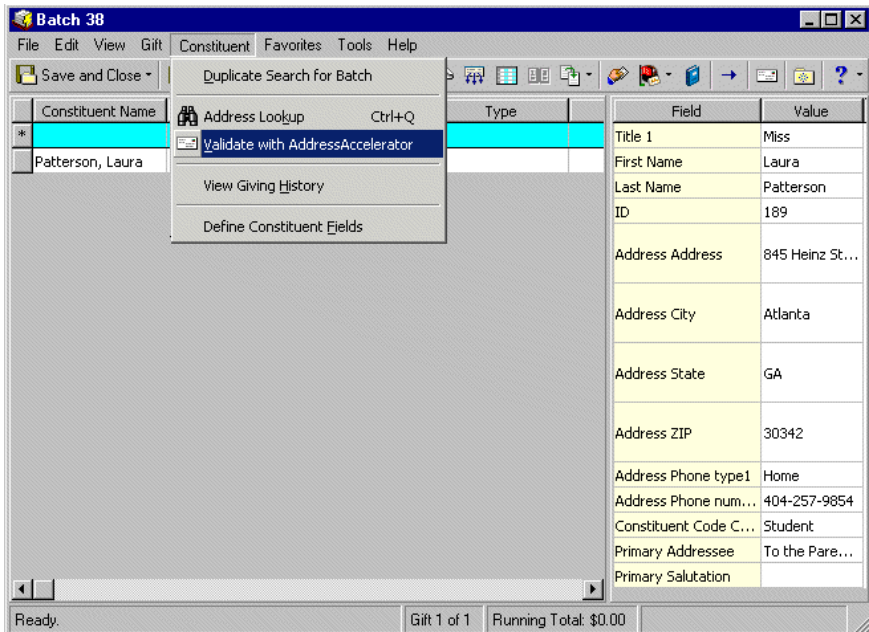
The available City, State, and ZIP Codes default into the Address Lookup grid.

2. Select the applicable address information and click **Open**. The address information you selected appears in the address fields in the Constituent Window of the gift batch.

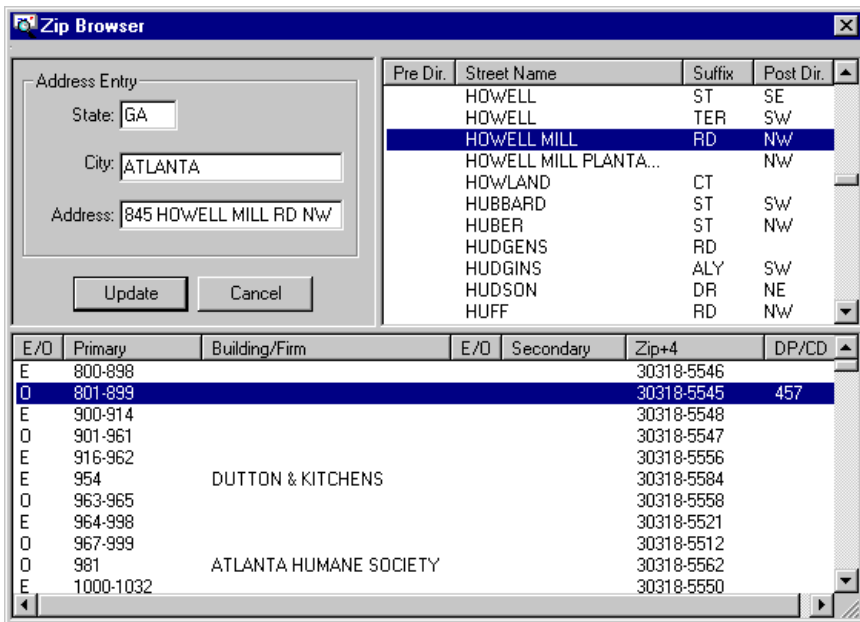
► Correcting an address for a constituent

Note: You can use shortcut keys to move around *The Raiser's Edge* without the use of your mouse. For example, to access the AddressAccelerator screen for a batch, press **ALT + C, V** on your keyboard.

1. From a gift batch, put your cursor in any address field in the Constituent Window for which you want to find an address, and select **Constituent, Validate with AddressAccelerator** from the menu bar. For more information about how to enter gift information into a batch, see “Adding Gifts in the Data Entry Grid” on page 134.



The Zip Browser screen appears.



From the Zip Browser screen, you can lookup states, cities, and street addresses to locate the constituent's correct address information.

Note: The address fields on the AddressAccelerator screen are editable. You can enter or change address information in these fields as you like and click **Update Address** to validate the address information you enter.

2. Make any necessary selections and click **Update**. If the address still cannot be validated, a message appears and asks you to search for the address. To search for the address, click **Yes**. If the address can be validated, you return to the AddressAccelerator screen.

AddressAccelerator

Current Address Information

Constituent ID:
 Address Type:
 Address: 845 Heinz Street
 City: Atlanta
 State: GA
 ZIP:
 County:
 CART:
 LOT:
 DPC:

Choose the 'Update Address' button to update the current address information shown above with the validated address displayed below.

Address: 845 H E Holmes Dr ☐ Add footnote as an address attribute

City: Atlanta

State: GA Georgia Date To Use: Today's date

ZIP: 30318-4527 DPC: 45 Comment:

County: Fulton

CART: C025 LOT: D0000

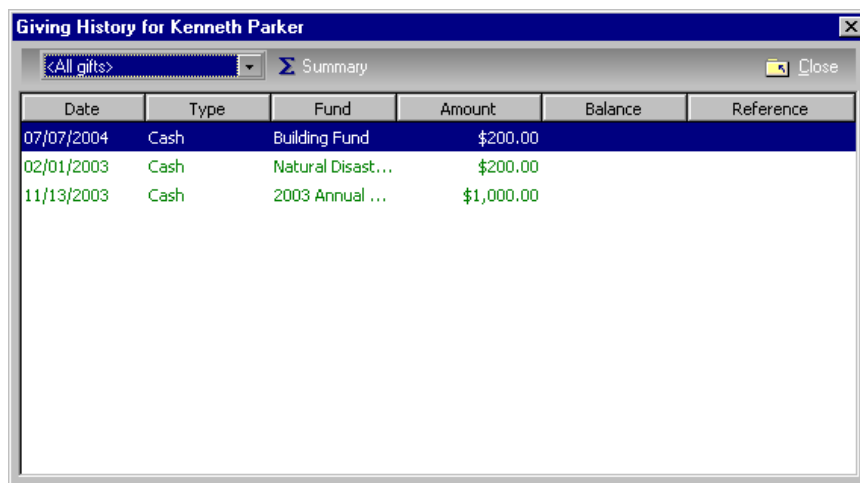
3. Click **Update Address**. The correct address information appears in the address fields in the Constituent Window.

Viewing Giving History

When you add gifts in a batch, you can select **Constituent, View Giving History** from the menu bar of a gift batch to view a constituent's giving history. When you select **Constituent, View Giving History** from the menu bar, the Giving History screen appears where you can view the date, type, fund, amount, balance, and reference for a gift. For more information about gifts, see the *Gift Records Guide*.

► Viewing giving history for a constituent

1. From the Data Entry screen for a batch, put your cursor anywhere in the row of the constituent for whom you want to view giving history, and select **Constituent, View Giving History** from the menu bar. The Giving History screen appears. For more information about how to open a gift batch, see “Accessing a Gift Batch” on page 79.



Date	Type	Fund	Amount	Balance	Reference
07/07/2004	Cash	Building Fund	\$200.00		
02/01/2003	Cash	Natural Disast...	\$200.00		
11/13/2003	Cash	2003 Annual ...	\$1,000.00		

2. When you are finished viewing the giving history for a constituent, click **Close**.

Adding and Removing Fields from a Batch

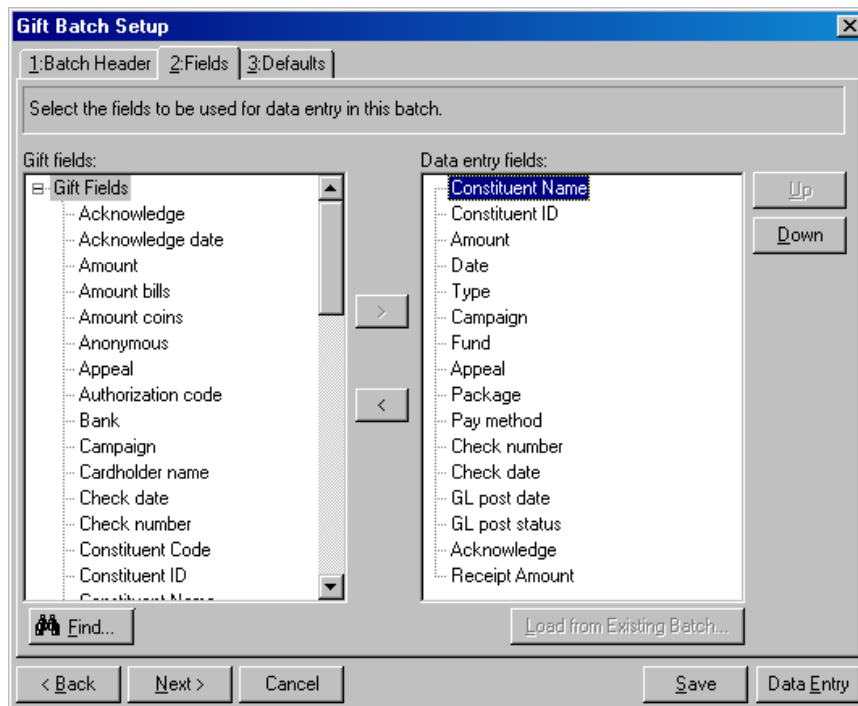
Warning: When the batch is open on more than one workstation, you cannot modify the fields in the batch.

After you begin to enter gift data, you can add and remove fields from a gift batch. When you remove fields that contain data, the data is not retained. If you add the field again, you must reenter the data. For example, if you remove the **Check date** field from a batch, then add it again, you need to reenter the check date for each gift in your batch.

► Adding and removing fields from a gift batch

1. From the Data Entry screen of a gift batch, select **Tools, Edit Batch Setup** from the menu bar. The Gift Batch Setup screen appears. For more information about how to open a gift batch, see “Accessing a Gift Batch” on page 79.

2. Select the Fields tab.



3. Add or remove fields as necessary. For example, to add the **Constituent Code** field, highlight the **Constituent Code** field in the **Gift fields** box and click the right arrow to move the **Constituent Code** field to the bottom of the **Data entry fields** box. For detailed information about the Fields tab, see “Fields Tab” on page 105.
4. To save your changes and return to the Data Entry screen, click **Data Entry**.

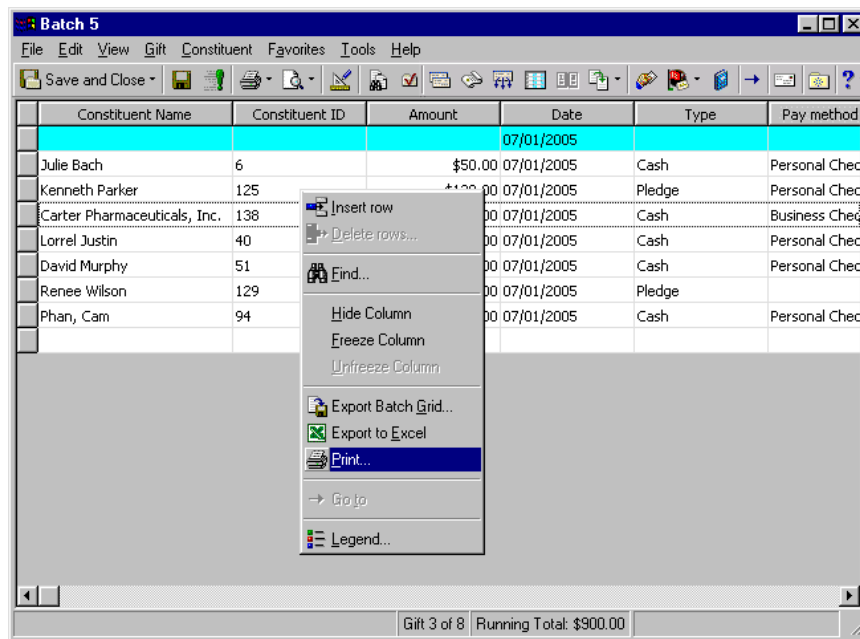
Printing Data from a Batch

You can use this procedure to print the current contents of the Data Entry grid.

► Printing the contents of the Data Entry grid

Note: To change your default printer, select **File, Print Setup** from the menu bar. For more information, see the *Program Basics Guide*.

1. From the Data Entry screen for a batch, right-click anywhere in the Data Entry grid. For more information about how to open a gift batch, see “Accessing a Gift Batch” on page 79. A shortcut menu appears.



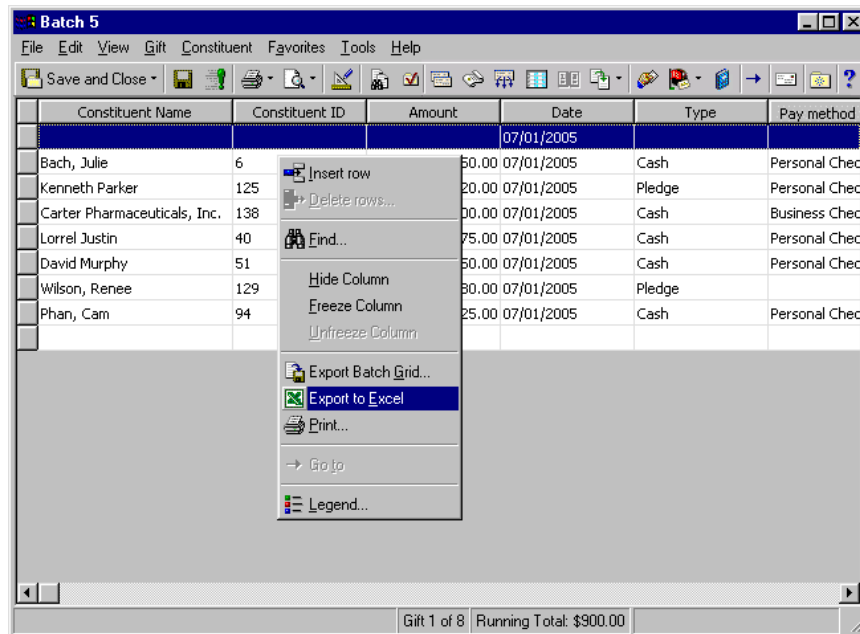
2. Select **Print** from the shortcut menu. A Print Grid Options screen appears where you can specify settings for printing. The contents of the Data Entry grid then print to your default printer.

Exporting Data from a Batch

You can export the entire Data Entry grid to Microsoft *Excel* or to another application. When you select the Data Entry grid, all the data entered in the batch is exported to your selected application. It is useful to export data from a batch to compare data in the export to data in the batch. For example, you may want to do a quick spot check of the data you entered in the batch.

► Exporting the Data Entry grid to Microsoft Excel

1. From the Data Entry screen for a batch, right-click anywhere in the Data Entry grid. A shortcut menu appears.



Note: To stop the export and return to the Data Entry screen in *Batch*, click **Cancel** on the Exporting File screen.

2. Select **Export to Excel** from the shortcut menu. The Exporting File screen appears and displays a progress indicator. In the lower left corner of this screen, the path and file name of the export file display.



Microsoft *Excel* automatically opens and displays the information exported from the Data Entry grid in *Batch*.

	A	B	C	D	E	F	G	H	I	J	K
	Constituent	Constituent	Amount	Date	Type	Campaign	Fund	Appeal	Package	Payment	Check N
1				07/01/2005			2005 Annual Fund				
2	Julie Bach	6	\$50.00	07/01/2005	Cash					Personal (1302	
3	Kenneth P	125	\$120.00	07/01/2005	Pledge		2005 Annual Fund			Personal Check	
4	Carter Ph	138	\$200.00	07/01/2005	Cash		2005 Annual Fund			Business (5120	
5	Lorrel Just	40	\$75.00	07/01/2005	Cash		2005 Annual Fund			Personal (305	
6	David Mur	51	\$150.00	07/01/2005	Cash					Personal (3115	
7	Renee W	129	\$180.00	07/01/2005	Pledge						
8	Phan, Can	94	\$125.00	07/01/2005	Cash					Personal (6021	

3. To save any changes to the export file, select **File, Save** from the Microsoft *Excel* menu bar.

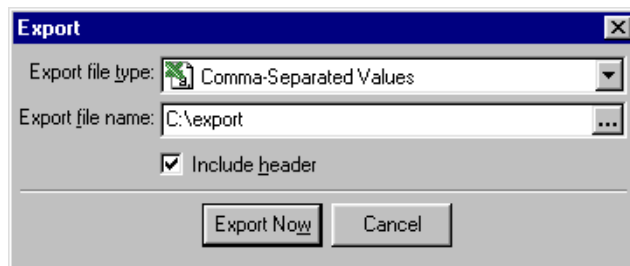
► Exporting the Data Entry grid to another application

1. From the Data Entry screen for a batch, right-click any row in the Data Entry grid. A shortcut menu appears.

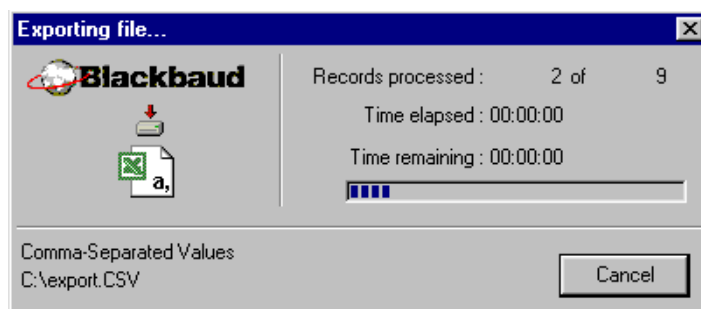
Constituent Name	Constituent ID	Amount	Date	Type	Pay method
			07/01/2005		
Julie Bach	6	\$50.00	07/01/2005	Cash	Personal Chec
Kenneth Parker	125	\$120.00	07/01/2005	Pledge	Personal Chec
Carter Pharmaceuticals, Inc.	138		07/01/2005	Cash	Business Chec
Lorrel Justin	40		07/01/2005	Cash	Personal Chec
David Murphy	51		07/01/2005	Cash	Personal Chec
Renee Wilson	129		07/01/2005	Pledge	
Phan, Cam	94		07/01/2005	Cash	Personal Chec

Note: To stop the export and return to the Data Entry screen in *Batch*, click **Cancel** on the Export screen.

2. Select **Export Batch Grid** from the shortcut menu. The Export screen appears so you can choose the file type, location, and file name for the export file.



3. In the **Export file type** field, select the format for the export file. For more information about the available export formats, see the *Query & Export Guide*.
4. In the **Export file name** field, enter the name and location to store the export file. To browse for the location to store the file, click the browse button.
5. If you want the first row of the export file to contain the column headings listed on the Data Entry screen, mark **Include header**.
6. To begin to export the Data Entry grid, click **Export Now**. The Exporting File screen appears and displays a progress indicator. In the lower left corner of this screen, the path and file name of the export file appear.



7. When the Exporting File screen closes, the export is complete. To open the export file, use an application compatible with the **Export file type** you selected.

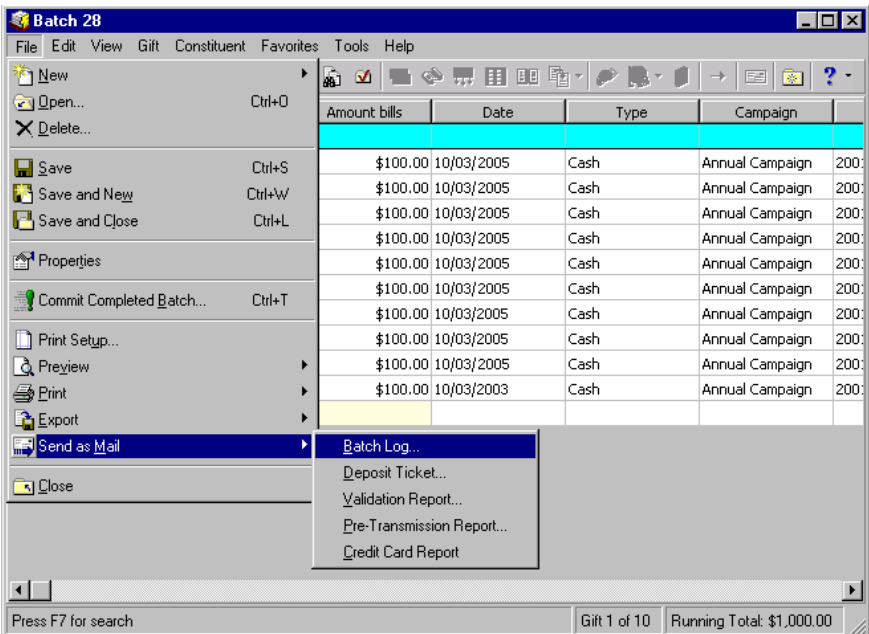
Sending a Gift Batch Report as Email

Note: *The Raiser's Edge* is compliant only with MAPI email software, such as Microsoft *Outlook*.

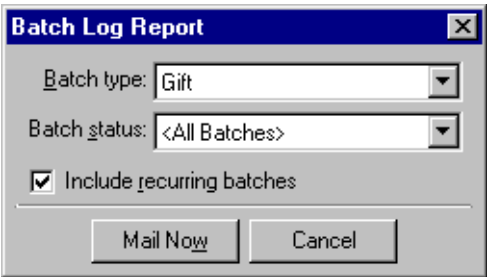
You can send information included in a batch report as email. For example, your Development Director is on a business trip and requests a batch log report for gift batches you committed to the database this week. You can send all gift batch reports as an email. When you send data as email, you can select the type of format for the information you send, select the recipients of the email, and check the names and addresses of the recipients. As a reminder, sending batch report information as email and working with options in *Mail* are separate. For more information about *Mail*, see the *Mail Guide*.

► **Sending a gift batch report as email**

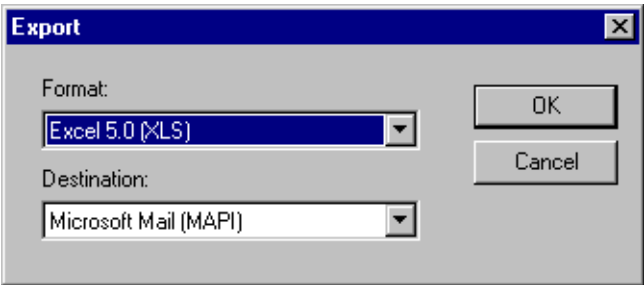
1. From the Data Entry grid, select **File, Send as Mail** from the menu bar. Select the type of report to send. For more information about how to open a gift batch, see “Accessing a Gift Batch” on page 79.



The Batch Log Report screen appears.



2. In the **Batch type** field, select the type of batch to include in the report. You can include constituent, gift, time sheet, or all batches.
3. In the **Batch status** field, select the status of batches to include in the report. You can include open, closed, or all batches.
4. To include recurring batches in the report, mark **Include recurring batches**.
5. Click **Mail Now**. The Export screen appears.

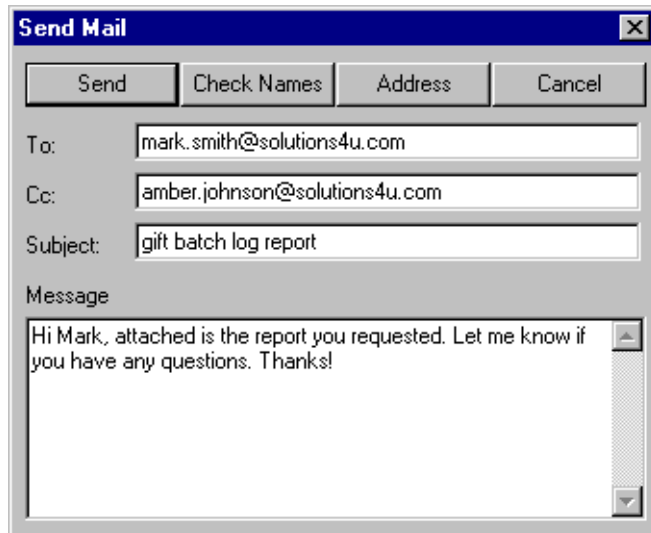


6. In the **Format** field, select the type of format in which to export the report. Some examples of format are Crystal Reports (RPT), Text, or Rich Text Format.

7. In the **Destination** field, select “Microsoft Mail (MAPI)”.

MAPI, an acronym for Messaging Application Program Interface, is the application used to send mail from a queue. This program interface enables you to send email from within a *Windows* application, such as Microsoft *Word*, and include the open document as an attachment.

8. Click **OK**. The Send Mail screen appears.



9. Enter the information on the Send Mail screen as shown in the previous picture. The report information you send is automatically attached to the email in the format you specified. You do not see the information in the body of the email, but once you send the email, the information from the report is sent.
10. On the Send Mail screen, click **Send**.

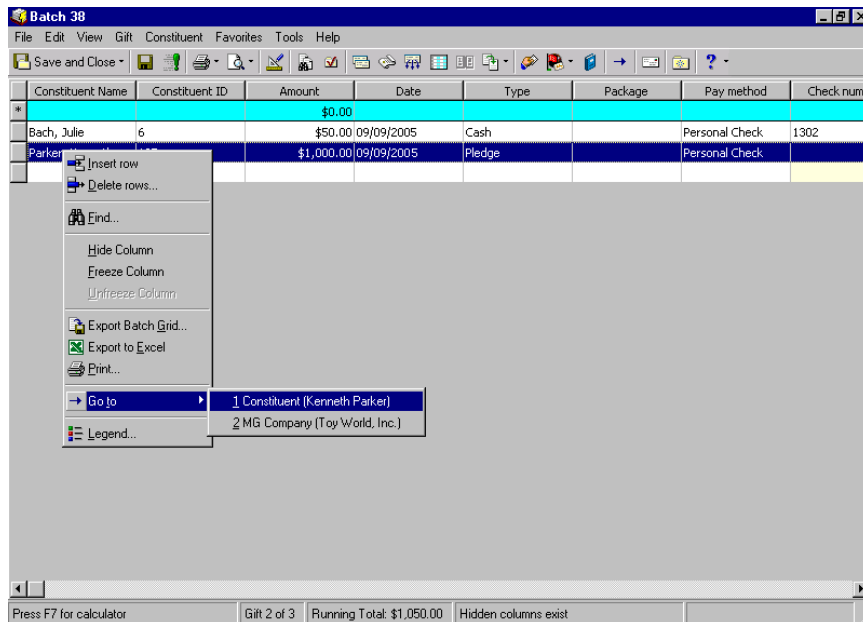
Opening Records Linked to Batch Gifts

When you select this option, a submenu appears and displays any record associated with the selected gift.

► Opening records linked to a gift in the batch

1. From the Data Entry screen for a batch, select the row that contains the gift for which you want to view linked records.

2. Right-click the selected row in the Data Entry grid. A shortcut menu appears.



3. Select **Go to**. A submenu appears and lists all the records linked to the highlighted gift.
4. Select the record to open. The record appears.

The screenshot shows the 'Mr. Kenneth Parker' constituent record window. The menu bar includes File, Edit, View, Constituent, Letter, Favorites, Tools, and Help. The toolbar contains various icons for saving, printing, and navigating. Below the toolbar are tabs for Attributes, Media, Actions, Honor/Memorial, Volunteer, Prospect, Membership, and Events. The 'Attributes' tab is active, showing sub-tabs for Bio 1, Bio 2, Addresses, Addressees/Salutations, Relationships, Appeals, Notes, and Gifts. The 'Biographical' section contains fields for Last name (Parker), First name (Kenneth), Middle name, Titles (Mr.), Suffixes, Nickname (Ken), Maiden name, ID (125), Gender (Male), SSN (247-88-7711), Birth date (03/05/1960), Age (42), Deceased? (checkbox), Marital status, Spouse (Madison R. Parker), and Solicit code. The 'Preferred Address : RE 7 Conversion-Home' section includes Country (United States), Address lines (557 Dogwood Court), City (Omaha), State (NE - Nebraska), ZIP (68147), and DPC. The 'Phones/E-mail/Links' section has a table with columns Type and Number/E-mail Address, showing a Cellular Phone at 402-555-6954. The 'This constituent' section has checkboxes for Is inactive, Is a solicitor, Gives anonymously, Has no valid addresses, and Requests no e-mail, along with a Details button. At the bottom are buttons for Education, Business, and Bank.

To close the record and return to the Data Entry screen for the gift batch, click **Save and Close** on the toolbar.

Group Adding Constituents to a Gift Batch

To group add constituents to a gift batch, select **Tools, Group Add Constituents to Batch** from the menu bar of a gift batch. When you select to group add constituents to a batch, you can search for an existing query or create a new query of constituents you want to add to the gift batch. For more information about how to create and use queries, see the *Query & Export Guide*.

► Group adding constituents to a gift batch

1. From a gift batch data entry screen, select **Tools, Group Add Constituents to Batch** from the menu bar. The Open Query screen appears. For more information about how to open a gift batch, see “Navigating in Batch” on page 79.

2. Under **Find Queries that meet these criteria**, decide what criteria to use when you search for your query and enter the information in the appropriate fields.
3. Click **Find Now**. If the search criteria you enter match a query in the database, it lists in the grid on the Open screen. Depending on how limited or detailed your criteria are, the program may find one or more queries.
4. In the grid, highlight the query to access.
5. Click **Open**. The constituent names included in the specified query appear in the gift batch data entry grid.

Globally Change Fields in a Gift Batch

To globally change field values in a gift batch, select **Tools, Global Change** from the menu bar of a gift batch. It is useful to globally change gift fields in a gift batch to change a certain field value for gifts entered in a batch. When you select **Tools, Global Change** from the menu bar, the field your cursor is in determines which field you have access to change.

When you globally change fields in a batch, it can alter the amounts and values for other information you entered in the batch. When you use the global change functionality, it is important you use caution. For example, if you change the amount for pledges, it can cause the installment schedule to be incorrect. In addition, a change to the gift amount does not update the matching gift amount, membership dues, or event registration fees. Note that you cannot globally change schedule, tribute, split gift, matching gift, soft credit, benefits, solicitor, membership, event, proposal, and package information.

► Globally changing fields in a gift batch

The field your cursor is in when you select to global change determines which field you access to change in the batch. This example uses the **Amount** field. For more information about global change information, see the *Global Add, Delete, & Change Guide*.

Warning: Before you globally change the **Amount** field, take into consideration the business rule about receipt and currency receipt amounts. For more information about this business rule, see the *Configuration & Security Guide*.

1. From the Data Entry screen, put your cursor in the **Amount** field and select **Tools, Global Change Amount** from the menu bar. The Global Change screen appears. For more information about how to open a gift batch, see “Navigating in Batch” on page 79.

2. In the **Type of change** field, select to increase or decrease an amount by percentage or amount.
3. In the **Increase by** field, enter the amount to increase or decrease the **Type of change**.
4. Click **Change Now**. You return to the Data Entry screen. The **Amount** field the **Amount** field reflects the amount change.

Sorting Items in a Batch

You can sort items in a gift batch by constituent name, amount, date, type, fund, GL post date, and GL post status. Use the Sort Batch screen to select to sort by these criteria alphabetically, either ascending or descending. It is useful to sort when you work with large amounts of data in a batch. Since you decide how to organize the batch, you can quickly find information you need in the batch. To sort the information in a gift batch, select **Tools, Sort Batch** from the menu bar.

► Sorting items in a batch

1. From the Data Entry screen, select **Tools, Sort Batch** from the menu bar of a gift batch. The Sort Batch screen appears. For more information about how to open a gift batch, see “Navigating in Batch” on page 79.

In the **Sort Order** frame, mark either **Ascending** or **Descending**. Depending on your selection here, the batch will either be sorted alphabetically ascending or descending.

2. In the **Sort By** field, select the field by which to sort the batch. For example, if you select “Constituent Name”, the batch is sorted either ascending or descending by the constituent name.
3. Click **OK**. You return to the Data Entry screen. The batch is sorted for existing items in the batch.

Authorizing Credit Card Transactions in Batch Using Electronic Funds Transfer

When the optional module *Electronic Funds Transfer* is present, you can create transmission files to process your credit card transactions. To authorize and process credit cards in **The Raiser's Edge**, you can use the Blackbaud *Payment Service* to interface with an authorization service such as *Blackbaud Merchant Services* or *IATS*. *ICVerify* is another authorization service that interfaces with **The Raiser's Edge** to automatically process your credit card transactions. For information about how to use either of these services with **The Raiser's Edge**, see the *Electronic Funds Transfer (EFT) Guide*.

Authorizing Credit Card Transactions in Batch Not Using Electronic Funds Transfer

When the optional module *Electronic Funds Transfer* is not present, you can authorize credit card transactions in *Batch*.

- ▶ **Authorizing credit card transactions in a batch with an authorization service such as Blackbaud Merchant Services or IATS**

Note: When you use an authorization service to process credit card transactions, you cannot include credit cards issued in multiple countries in the same gift batch. For gifts that use credit cards issued in different countries, you must create separate gift batches.

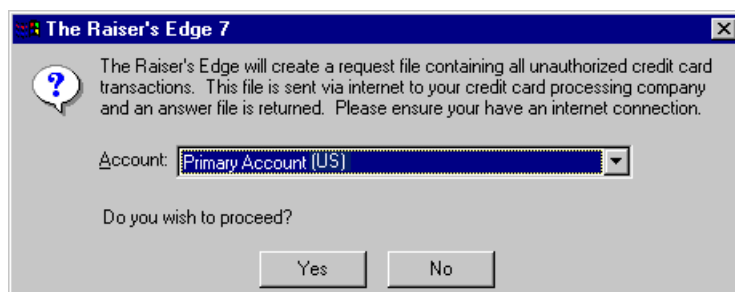
To authorize your credit card transactions, you must first set up a merchant account with an authorization service such as *Blackbaud Merchant Services* or *IATS*, create an account with the *Blackbaud Payment Service*, and set several options in *Configuration*, such as a login ID and password. For information about how to set up a merchant account and set *Configuration* options, see the *Electronic Funds Transfer (EFT) Guide*.

You must include the **Card Holder Name**, **Credit Card Number**, **Authorization code**, **Expires on**, and **Credit Type** gift fields in your batch. To authorize credit card transactions when the optional module *Electronic Funds Transfer* is not present is the equivalent of creating credit card transmission files when the optional module *Electronic Funds Transfer* is present.

For more information about available options when you do have the optional module *Electronic Funds Transfer*, see the *Electronic Funds Transfer (EFT) Guide*.

1. From the Data Entry screen, select **Tools, Authorize Credit Card Transactions** from the menu bar of a gift batch. Make sure you include the **Card Holder Name**, **Credit Card Number**, **Authorization code**, **Expires on**, and **Credit Type** gift fields in your batch. For more information about how to open a gift batch, see “Navigating in Batch” on page 79.

A screen appears to ask whether to proceed with the request file.



2. In the **Account** field, select the merchant account to which to apply credit card payments included in your batch. The available accounts in the drop down menu are pulled from the accounts you set up in *Configuration*. For more information about these *Configuration* settings, see the *Configuration and Security Guide*.
3. Click **Yes**. **The Raiser's Edge** sends the information in the gift batch to the Blackbaud *Payment Service*. The Blackbaud *Payment Service* replaces the token identifiers in the batch with the corresponding credit card numbers and uses the login credentials entered for the merchant account in *Configuration* to interface with your authorization service. The service authorizes and processes all credit card information included in your batch.

Once the batch has completed processing, **The Raiser's Edge** polls the Blackbaud *Payment Service* and looks for the answer file from the authorization service to see whether the credit card gifts are rejected or accepted.

- If the credit card transaction is approved, the authorization service puts a code that begins with "Y" in the **Authorization Code** field of the gift batch. The authorization service verifies that sufficient funds exist in the account for transfer. If sufficient funds exist, the account is processed and a transfer of funds takes place immediately.
 - If the credit card transaction is rejected, the authorization service adds "N" in front of the code. When **The Raiser's Edge** receives the response, it strips the "N" from the authorization code, converts the code to text, and puts the text into the **Rejection Code** field of the batch. Examples of rejection codes include the credit card not being supported by the authorization service, credit card is expired, credit card is lost or stolen, invalid card status, or unable to process transaction.
4. If you use *Blackbaud Merchant Services* or IATS, to view your transactions, refund credit cards, or make any additional changes to the credit card transactions, log onto the authorization service website.

► Authorizing credit card transactions in a batch with ICVerify

To authorize your credit card transactions, *ICVerify* must be present and initialized. You must also include the **Card Holder Name**, **Credit Card Number**, **Authorization code**, **Expires on**, and **Credit Type** gift fields in your batch. To authorize credit card transactions when the optional module *Electronic Funds Transfer* is not present is the equivalent of creating credit card transmission files when the optional module *Electronic Funds Transfer* is present.

For more information about available options when you do use the optional module *Electronic Funds Transfer*, see the *Electronic Funds Transfer (EFT) Guide*.

1. From the Data Entry screen, select **Tools, Authorize Credit Card Transactions** from the menu bar of a gift batch. Make sure you include the **Card Holder Name**, **Credit Card Number**, **Authorization code**, **Expires on**, and **Credit Type** gift fields in your batch. For more information about how to open a gift batch, see "Navigating in Batch" on page 79.

A message appears to ask whether to proceed with the request file.

2. Click **Yes**. **The Raiser's Edge** securely retrieves the credit card numbers for the token identifiers in the batch from the Blackbaud *Payment Service* and immediately sends the encrypted transmission file to *ICVerify* for initial verification. Remember, this step does not transfer the funds from the donor's credit card to your account. This step determines whether the card has a sufficient account balance to cover the transaction and either authorizes or rejects the credit card.
 - If the credit card is approved, *ICVerify* puts an authorization code in the **Authorization Code** field of the batch. To transfer the funds from the donor's account to your organization's account, you can communicate with or "settle" with *ICVerify*. For more information about how to settle your account with *ICVerify*, see your *ICVerify* user's guide.
 - If the credit card is rejected, *ICVerify* includes an "N" in front of the authorization code. When **The Raiser's Edge** receives the response from *ICVerify*, **The Raiser's Edge** strips the "N" from the authorization code and puts a rejection code in the **Rejection Code** field of the batch. Examples of rejection codes can be Invalid Account Number or Card Expired. To re-authorize the declined credit cards to *ICVerify*, you must first clear all declined authorization codes from the batch. For more information about how to clear declined authorization codes from a batch, see "Clear declined authorization codes from a gift batch" on page 197.

This process does not actually transfer the funds. You must settle the account separately through *ICVerify*. For more information about how to transfer credit card funds from a donor's account, see your *ICVerify* user's guide.

Clearing Declined Authorization Codes in Batch

When you process your credit card transactions, the authorization service automatically updates the **Authorization Code** field after you create a credit card transmission file and authorize your transactions.

If the credit card transaction is approved, the authorization service puts an authorization code beginning with "Y" in the **Authorization Code** field of the gift batch. The authorization service verifies that sufficient funds exist in the account for transfer. If sufficient funds exist, the account is processed and a transfer of funds takes place immediately. It is important to remember that, unlike *ICVerify*, an authorization service can process credit cards and transfer funds from the donor's credit card to your organization's bank account. With *ICVerify*, an approval code only means the donor's credit card account has a sufficient account balance to cover the financial transaction. At this point, no transfer of funds has taken place. The transfer of funds takes place when you settle the transfer in *ICVerify*. For more information about how to settle your account with *ICVerify*, see your *ICVerify* user guide.

If the credit card transaction is rejected, the authorization service adds "N" in front of the code. When **The Raiser's Edge** receives the response, it strips the "N" from the authorization code, converts the code to text, and puts the text into the **Rejection Code** field of the batch. Examples of rejection codes include the credit card not being supported by the authorization service, credit card is expired, credit card is lost or stolen, invalid card status, or unable to process transaction.

To resubmit the declined gifts, you must clear the declined authorization codes from the batch and create a new transmission file. To automatically clear declined authorization codes from a gift batch, select **Tools, Clear Declined Authorization Codes** from the menu bar of a gift batch.

► Clear declined authorization codes from a gift batch

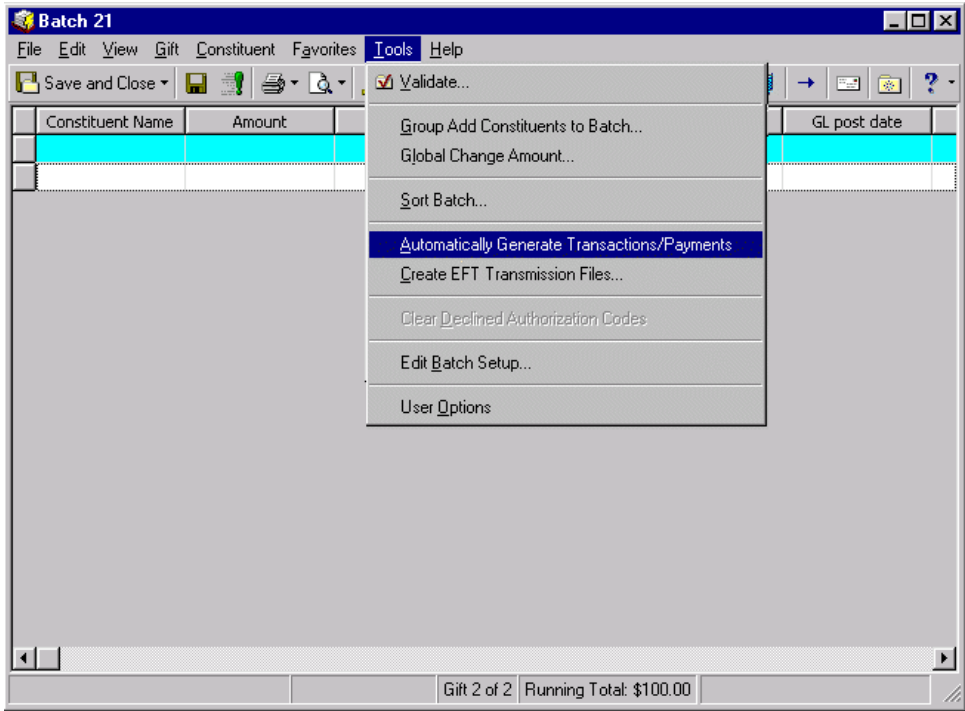
1. From the Data Entry screen of a gift batch, select **Tools, Clear Declined Authorization Codes** from the menu bar. A warning appears. For information about how to open a gift batch, see "Navigating in Batch" on page 79.
2. To clear the declined authorization codes from the gift batch, click **Yes**. The program clears the declined authorization codes from the batch, and you return to the Data Entry screen. To return to the data entry screen without clearing declined authorization codes, click **No**.
3. To save your changes to the gift batch, click **Save and Close** on the toolbar.

Automatically Generating Pledge Payments and Recurring Gift Transactions in a Batch

Note: You can use shortcut keys to move around **The Raiser's Edge** without the use of your mouse. For example, to automatically generate transactions and payments for a gift batch, press **ALT + T, A** on your keyboard.

If you use the optional module *Electronic Funds Transfer*, you can use the **Automatically Generate Transactions/Payments** menu option in *Batch* to automatically generate gift records for recurring gift transactions and pledge payments. For example, Anthony Ellis has a membership that is linked to a recurring gift. When you select the **Automatically Generate Transactions/Payments** menu option in *Batch*, you can automatically generate a payment for that recurring gift, which is linked to his membership. Anthony's recurring gift payment information defaults into a row in the gift batch.

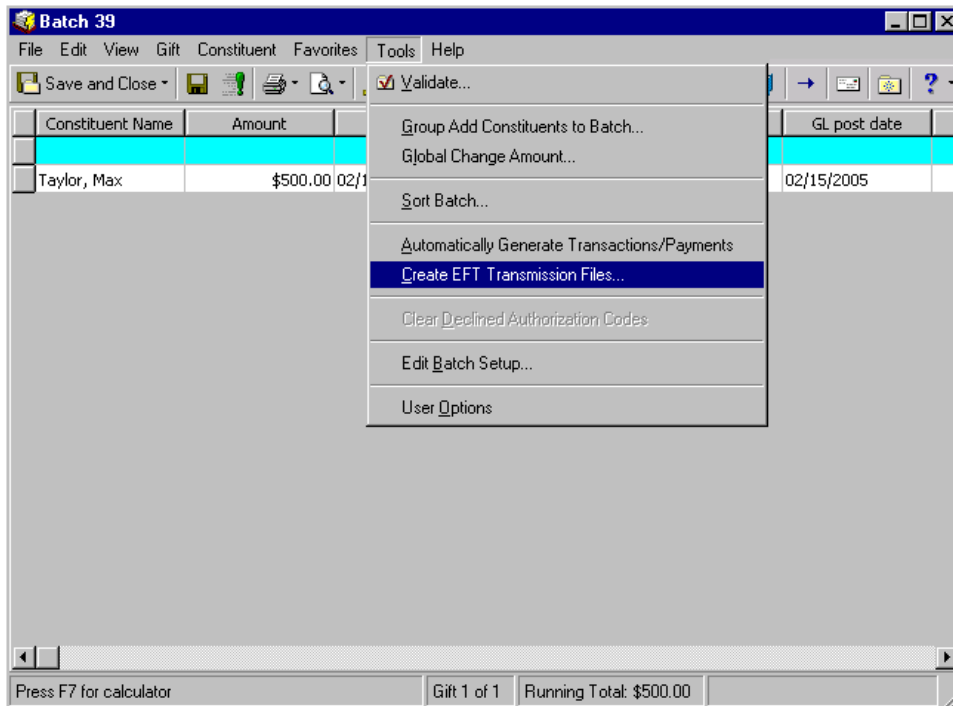
If the optional module *Electronic Funds Transfer* is present, you can then choose to **Create EFT Transmission Files** for your batch. When you work with your credit card authorization process, you can also use the **Clear Declined Authorization Codes** option. These options, in addition to the **Automatically Generate Transactions/Payments** option are only available if the optional module *Electronic Funds Transfer* is present. For more information about how to automatically generate pledges and recurring gifts, and other available options with *Electronic Funds Transfer*, see the *Electronic Funds Transfer (EFT) Guide*.



Create EFT Transmission File

Note: When you use an authorization service such as *Blackbaud Merchant Services* or IATS to process credit card transactions, you cannot include credit cards issued in multiple countries in the same gift batch. For gifts that use credit cards issued in different countries, you must create separate gift batches.

Transmission files contain all the necessary information to electronically transfer funds from a donor's bank account or credit card to your organization's bank account. There are two types of transmission files — Direct Debit and Credit Card. Transmission files are associated with a specific batch. For each batch in the database, you can create one direct debit transmission file and one credit card transmission file. This option is only available if the optional module *Electronic Funds Transfer* is present. For more information about how to create transmission files, and other available options with *Electronic Funds Transfer*, see the *Electronic Funds Transfer (EFT) Guide*.



Using the Gift Barcode Field in a Gift Batch

Note: When you scan appeal cards, a barcode that contains only appeal information begins with an “A”. A barcode that contains appeal and package information begins with a “K”.

In *Batch*, you can use the **Gift Barcode** field to scan information from phonathon forms, appeal cards, renewal notices, and reminders into a gift batch. For example, you can set up a new phonathon form in *Mail* and select a gift barcode to appear on the form. When you receive gift information on the phonathon form, you can scan the barcode into the **Gift Barcode** field in a new gift batch. The gift barcode stores the constituent information you set up on the phonathon form or appeal card. For example, this information can be the Constituent ID, Fund ID, and the Appeal ID. When you receive the phonathon form or appeal card back from the donor with a gift, simply scan the barcode while you enter gift information into the gift batch.

Note: When you scan phonathon forms, a barcode on the top portion of the phonathon form that contains only appeal information begins with a “P”. A barcode on the bottom tear-off portion of the phonathon form that contains only appeal information begins with a “C”. One that contains appeal and package information begins with an “F”.

Once you scan the barcode, the constituent, gift type, campaign, fund, and appeal information automatically fill in the appropriate fields in the gift batch. When you set up a new gift batch, you must select the **Gift Barcode** field to be included in the batch. To use this option in *Batch*, you can use any scanner that can read “12 point 3 of 9” barcode font. For more information about how to set up phonathon forms or appeal cards, see the *Mail Guide*.

► **Using the gift barcode field in a gift batch**

1. Set up a new phonathon form with the information to appear when you print the phonathon form. For more information about how to set up a new phonathon form, see the *Mail Guide*.
2. Create a new gift batch that includes the **Gift Barcode** field. For more information about how to set up a new gift batch, see “Gift Batch Setup” on page 93.
3. From the Data Entry screen of a gift batch, put your cursor in the **Gift Barcode** field.

Date	Type	Fund	GL post date	GL post status	Gift bar code

4. Scan the barcode on the phonathon form into the **Gift Barcode** field. The constituent's information appears in the appropriate fields in the gift row.

Validating a Batch

Note: You can validate a batch when the batch is open on more than one workstation. If you do this, the program checks only the gifts entered in the batch open on your workstation.

When you validate a batch, the program examines all gifts entered in the batch to determine whether any data entry errors exist. For example, you may have added two gifts with the same gift ID. Because all gift IDs must be unique, the program will not add the two gifts with identical gift IDs to the database when you commit the batch. We strongly recommend you validate a batch before or while you commit the batch to the database so you can locate data entry errors.

When the program finishes its batch validation, the Validate Batch screen appears and displays the results of the validation process. Exceptions are created for any problem found in the batch and appear either on the Validate Batch screen or when you commit the batch to the database.

Validate Batch 36 Totals

Validation Complete. Exceptions have been found!

Projected totals for this batch do NOT match running totals

Projected amount:	\$0.00	Projected number of gifts:	0
Running amount:	\$600.00	Running number of gifts:	2

Other Exceptions

Constituent	Gift Date	Gift Type	Gift Amount	Exception
No batch row exceptions have been found.				

Print Exception Report Close Modify Batch Totals

If any exceptions are found, you can correct the problem so you can commit the batch to the database without difficulty. For example, in a gift batch, you may have an inactive letter associated with a pledge. When you validate this batch, an exception occurs to let you know that an inactive letter exists in the batch. You can then go back and make the appropriate changes in the batch. If the program finds more than one exception on a single row, it displays only the first exception in the grid. After you resolve all the exceptions, we recommend you validate the batch a second time to verify a single row did not have multiple exceptions. You can also validate a batch while you commit the batch to the database. When you select to commit a batch to the database, the program runs a second validation if you mark **Validate batch before committing** on the screen. You can preview or print the exception report for the gifts that could not be committed. For more information about how to commit gifts to the database, see “Committing a Batch” on page 203.

► Validating a gift batch

Warning: When you make selections on the Validate Gift Batch screen, choose the same options you plan to choose when you commit the batch to the database so the program can locate all applicable errors in the batch.

1. From the Data Entry screen for a gift batch, select **Tools, Validate** from the menu bar. The Validate Gift Batch screen appears. For more information about how to open a gift batch, see “Accessing a Gift Batch” on page 79.

Note: Gifts can be automatically applied to a recurring gift if the recurring gift is active, the **Pay method** is cash, and the next recurrence does not have the status of pending. A recurring gift transaction has the status of pending when the previous transaction has not yet been committed.

2. To automatically apply a gift to a constituent's existing outstanding pledge or recurring gift, mark **Automatically apply gifts to pledges and recurring gifts**.

When you mark this checkbox, the program determines whether each constituent who gave an eligible gift has any outstanding pledges or recurring gifts. If no outstanding pledges or recurring gifts exist for the constituent, the gift is committed to the database as you entered it. When a constituent has outstanding pledges or recurring gifts, the program applies the gift to the oldest outstanding pledge or recurring gift matching the funds entered in the batch. If you split the gift entered in the batch over several funds, the program selects the pledge or recurring gift with the same funds. When an exact match does not exist, the program selects a pledge or recurring gift with at least one common fund listed on the constituent's record. Each gift is automatically applied to only one pledge or recurring gift.

3. When you mark **Automatically apply gifts to pledges and recurring gifts**, select whether you want the program to apply the gift to a pledge or recurring gift only if the fund selected for the gift in the batch matches the fund selected for the pledge or recurring gift.

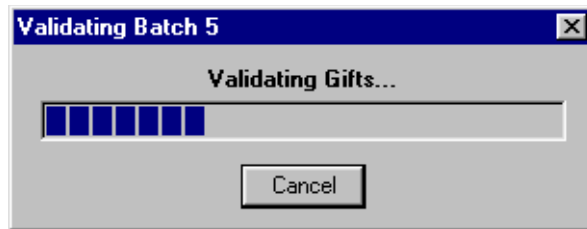
Note: If the program creates an exception for a gift, it does not let you commit the gift to the database until you correct the data entry error.

4. When you apply a gift to a pledge that is greater than the amount of the pledge transaction, select whether you want the program to create a separate cash gift for the excess amount or create an exception and do not commit the gift.

Note: Authorization codes that begin with 'N' or non-existent codes are considered declined and create exceptions.

5. If you entered credit card authorization codes in the **Authorize code** field, mark **Check credit card authorization codes on credit card gifts** so declined gifts are not committed to the database. If a credit card payment with a declined authorization code is found, select whether the program should commit the gift anyway or create an exception.

- Click **Validate Now** to begin the validation process. The program displays a status bar showing the progress for the validation. To stop the validation of the batch and return to the Data Entry screen, click **Cancel**.



- When the program finishes its batch validation, the Validate screen appears and displays the results.

Other Exceptions				
Constituent	Gift Date	Gift Type	Gift Amount	Exception
No batch row exceptions have been found.				

- The top section of the Validate screen compares the information entered in the **Projected number of gifts** and **Projected amount** fields on the Gift Batch Setup screen with the information entered in the batch. If you are certain the information entered in the batch is correct, click **Modify Batch Totals** to update the **Projected number of gifts** and **Projected amount** fields. If the information in the **Projected number of gifts** and **Projected amount** fields is correct, verify no data entry errors exist in the batch.
- Click **Print Exception Report** to print a report that contains information about the exceptions in this gift batch. For more information about this exception report, see "Batch Validation Report" on page 210.
- To return to the Data Entry screen, click **Close**.

Committing a Batch

Warning: You cannot commit the batch when it is open on more than one workstation.

When you finish entering gifts in the batch, you can commit the batch to add the new gifts to your database. The Commit Batch screen consists of the General tab and the Payments tab. Depending on your settings, the Credit Card Payments tab and the Recurring Batch tab may also appear.

► Committing a gift batch

You cannot modify the Data Entry screen after you commit a gift batch unless you mark **This batch is recurring** on the Batch Header tab of the Gift Batch Setup screen. If the batch is not recurring, you can open the batch to view the gifts and options you selected, but you cannot modify the Data Entry screen.

Note: You can use shortcut keys to move around *The Raiser's Edge* without the use of your mouse. For example, to commit a gift batch, press **ALT + F, B** or **CTRL + T** on your keyboard.

1. From the Data Entry screen for a gift batch, select **File, Commit Completed Batch** from the menu bar. For more information about how to open a gift batch, see “Accessing a Gift Batch” on page 79. The Commit Gift Batch screen appears so you can specify options the program uses when it commits the batch.

Commit Gift Batch

1: General | 2: Payments

Step 1: Enter general information

☒ Validate batch before committing

☒ Create gift query of committed gifts

☒ Create a new batch of exceptions

☒ Create control report Summary ☐ Preview ☐ Print

☒ Delete batch after committing

☒ Automatically apply gifts to pledges and recurring gifts

☐ Only apply gifts to pledges and recurring gifts with the same fund(s)

Batch Statistics

Running number of gifts:	1	Number of matching gifts:	0
Running amount:	\$1,000.00	Matching gift amount:	\$0.00
Created on:	07/07/2005 10:41:19 ...	Times committed:	0
Last changed on:	07/10/2005 8:54:01 AM	Last committed on:	
Created by:	Supervisor		

< Back | Next > | Cancel | Commit Now

Note: The **Batch Statistics** grid displays information about the gifts entered in the batch.

2. To validate the batch before you commit it to the database, mark **Validate batch before committing**. If you have not validated the batch, we strongly recommend you mark this checkbox. If you validate a batch, it can locate problems you may encounter when you commit the batch.
Even if you have already validated the batch, you should mark **Validate batch before committing** to run a second validation to find exceptions the first validation process may not have detected.
3. To create a query of all gifts you entered in this batch, mark **Create gift query of committed gifts**. If you mark this checkbox, the Save Static Query screen appears after the program commits the batch to the database. We strongly recommend you mark this checkbox. You can use this query to send a letter or other mailing to the constituents for whom you added gifts in this batch.

Warning: When you mark **Create gift query of committed gifts**, the program includes only the gifts committed to the database. Any gifts not committed to the database due to exceptions are not included in the query.

4. To create a new batch that contains all gifts not committed to the database, mark **Create a new batch of exceptions**.
5. To print or preview a control report after you commit the batch to the database, mark **Create control report**. When you mark this checkbox, select whether to create a Detail or Summary report in the adjacent field. Also, select whether to print or preview the control report.

6. To delete the batch file after you commit the batch to the database, mark **Delete batch after committing**. Even though the program deletes the batch file, the batch number is never reused. To reduce the size of your database, you may want to mark this checkbox.

Note: Gifts can be automatically applied to a recurring gift if the recurring gift is active, the **Pay method** is cash, and the next transaction does not have the status of pending. A recurring gift transaction has the status of pending when a previous transaction for a pledge or recurring gift has been automatically generated and is present in a batch waiting to be committed.

7. To select whether the program automatically applies a gift to a pledge or recurring gift when a constituent has an outstanding pledge or recurring gift, mark **Automatically apply gifts to pledges and recurring gifts**. For more information about how to automatically generate gifts in a batch, see the *Electronic Funds Transfer (EFT) Guide*.

When you mark this checkbox, the program determines whether each constituent who gave an eligible gift has any outstanding pledges or recurring gifts. If no outstanding pledges or recurring gifts exist for the constituent, the gift is committed to the database as you entered it. When a constituent has outstanding pledges or recurring gifts, the program applies the gift to the oldest outstanding pledge or recurring gift matching the fund listed in the batch. If you split the gift entered in the batch over several funds, the program selects the pledge or recurring gift with the same funds. When an exact match does not exist, the program selects a pledge or recurring gift with at least one common fund listed on the constituent's record. Each gift is automatically applied to only one pledge or recurring gift.

If you marked **When adding a gift to a batch, warn if constituent has** in *Configuration*, a screen appears and asks you to apply gifts to pledges and recurring gifts as you manually entered gifts in the batch.

8. When you mark **Automatically apply gifts to pledges and recurring gifts**, select whether you want the program to apply the gift to a pledge or recurring gift only if the fund selected for the gift in the batch matches the fund selected for the pledge or recurring gift.

Note: If the program created an exception for a gift, it will not commit the gift to the database unless you correct the data entry error.

9. To view the Payments tab, click **Next**.

Commit Gift Batch

1: General 2: Payments

Step 2: Indicate how to process payments

If a payment overpays a pledge:

☐ Create gift with remainder ☒ Create an exception (do not commit the payment)

If a payment is applied to a gift that is linked to a membership:

☒ Apply the payment to the same membership

Batch Statistics			
Running number of gifts:	1	Number of matching gifts:	0
Running amount:	\$200.00	Matching gift amount:	\$0.00
Created on:	10/25/2005	Times committed:	0
Last changed on:	10/25/2005	Date last committed:	
Created by:	Supervisor		

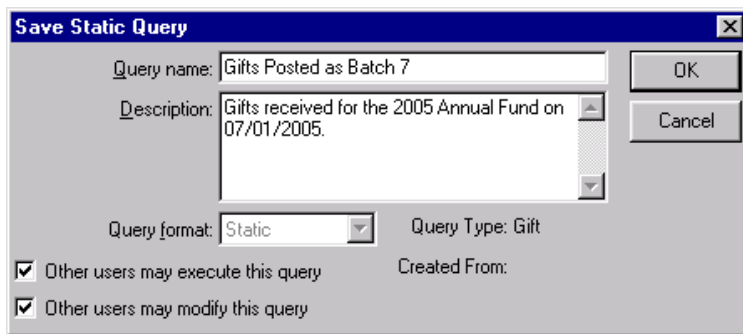
< Back Next > Cancel Commit Now

Note: If the optional module *Electronic Funds Transfer* is not present, a Credit Card Payments tab appears to prompt you to specify settings for any credit card gifts in the batch.

10. When you apply a gift to a pledge that is greater than the amount of the pledge transaction, select whether you want the program to create a separate cash gift for the excess amount or create an exception and do not commit the gift.
11. When a pledge payment or recurring gift transaction is applied to a gift linked to a membership, mark **Apply the payment to the same membership** to select whether to apply the payment to the membership as well.

Note: When you work with recurring gift batches, the Recurring Batch tab appears on the Commit Gift Batch screen. You can specify the gift date, post date, and batch number on this tab.

12. To begin to commit the batch to the database, click **Commit Now**.
13. If you marked **Create gift query of committed gifts** on the General tab of the Commit Gift Batch screen, the Save Static Query screen appears.



The "Save Static Query" dialog box has a title bar with a close button. It contains the following fields and controls:

- Query name:** A text box containing "Gifts Posted as Batch 7".
- Description:** A text box containing "Gifts received for the 2005 Annual Fund on 07/01/2005." with a vertical scrollbar.
- Query format:** A dropdown menu set to "Static".
- Query Type:** A label "Gift" next to the format dropdown.
- Created From:** A label with no value.
- Other users may execute this query:** A checked checkbox.
- Other users may modify this query:** A checked checkbox.
- Buttons:** "OK" and "Cancel" buttons on the right side.

14. In the **Query name** field, the program defaults "Gifts Posted as Batch []". You can use this name or enter a new name for the query.
15. In the **Description** field, enter a description that explains the contents of the query. For example, enter "Gifts received for the 2005 Annual Fund on 07/01/2005."
16. To enable other users to use this query, mark **Other users may execute this query**.
17. To enable other users to modify this query, mark **Other users may modify this query**.

Note: To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), *The Raiser's Edge* does not store credit card numbers in the database. When you commit a batch that contains credit card numbers, the program commits the token identifiers generated by the Blackbaud *Payment Service* for the numbers to the database. In the records created or updated by the batch, only the last four digits of the credit card number appear.

18. Click **OK**. A progress indicator appears.



The "Committing Batch 7" dialog box has a title bar with a close button. It contains the following elements:

- Text:** "Committing Gifts..." centered in the dialog.
- Progress Bar:** A horizontal bar with 20 small blue squares, all of which are filled, indicating 100% completion.

If you marked **Create control report** on the General tab of the Commit Gift Batch screen, a control report previews on screen or prints to your default printer.

19. The Commit Batch screen appears.

Commit Complete	
Batch:	31
Gifts in Batch:	2
Gifts Committed:	2
Amount Committed:	\$50.00
Exceptions:	0

Matching gifts and gifts added using the 'Add Payment to Pledge or Recurring Gift' menu option are not included in the batch totals.

Matching Gifts:	0	Recurring Gift Transactions Added:	0
Matching Gift Amount:	\$0.00	Recurring Gift Transactions:	\$0.00
Pledge Payments Added:	0	Cash Overpayments Added:	0
Pledge Payments:	\$0.00	Cash Overpayments Amount:	

Close Exception Report

The Commit Batch screen details the total number and amount of gifts committed. The bottom section of the screen shows the types of gifts not included in the batch totals. Note that **Cash Overpayments Added** is the total number of cash gifts added as a result of a pledge overpayment that have been committed with the batch. **Cash Overpayment Amount** is the total amount of cash gifts added as a result of a pledge overpayment that have been committed with the batch. For more information about how to overpay pledges in a batch, see “Applying a Payment to a Pledge in a Gift Batch” on page 166.

20. If any exceptions were created, click **Exception Report** to view an exception report. We strongly recommend you print this report so you can maintain a record of the gifts that were not committed in the batch. For more information about this report, see “Batch Commit Exception Report” on page 220.

Note: When you commit a gift through *Batch*, you can view the batch number associated with a gift from the gift record. On the gift tab of a gift record, a batch icon appears in the lower right corner of the status bar. To view the batch number, hover your mouse over the batch icon.

21. Click **Close**. You return to the Batch page.

Refreshing a Batch

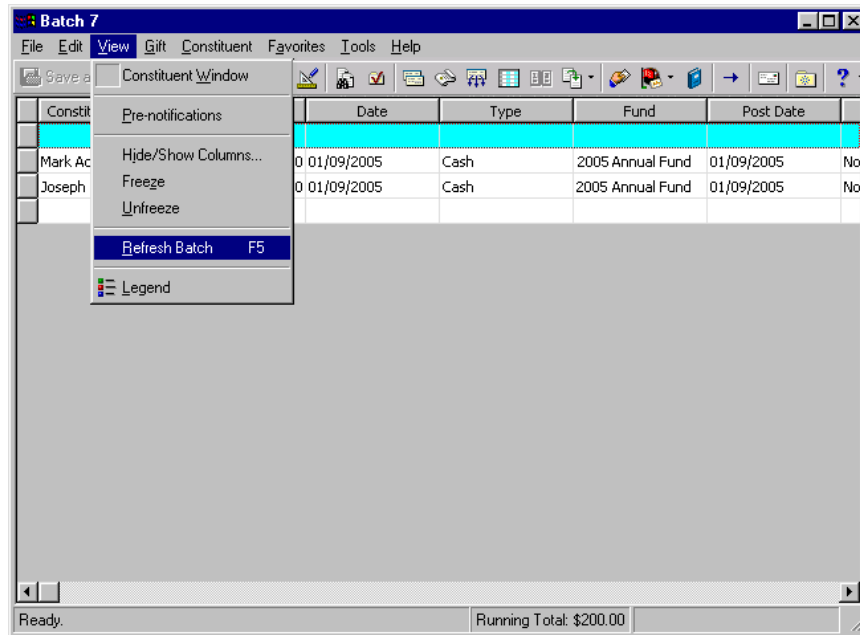
If you work with a batch that is open on more than one workstation, you can use the **Refresh** option to update the batch open on your workstation with the information added by other users. For example, Betty and Frank both add information to the same gift batch from different workstations. Frank adds five gift records and saves his batch. When Frank saves his batch, five new gift records are added to the main database. Betty adds three gift records, then decides to refresh her batch. When Betty refreshes her copy of the batch, the five gift records Frank added appear in the batch open on Betty’s workstation. When you refresh a batch, the program updates the batch with all the entries in the main batch database.

If Frank decides to refresh his batch, the three records Betty added in her copy of the batch do not appear in the batch open on Frank’s workstation because Betty has not saved her batch. When Betty saves her copy of the batch, the three gift records she added are saved to the main batch database. For more information about how to use a batch open on multiple workstations, see “Understanding the Multi-User Capabilities of a Gift Batch” on page 92.

► Refreshing an existing constituent or gift batch

Note: You can use shortcut keys to move around *The Raiser's Edge* without the use of your mouse. For example, to refresh a gift batch, press **F5** on your keyboard.

1. From the Data Entry screen for a gift batch, select **View, Refresh Batch** from the menu bar. For more information about how to open a gift batch, see “Accessing a Gift Batch” on page 79.



2. The program checks the main database for this batch and adds any entries not present in the batch open on your workstation.

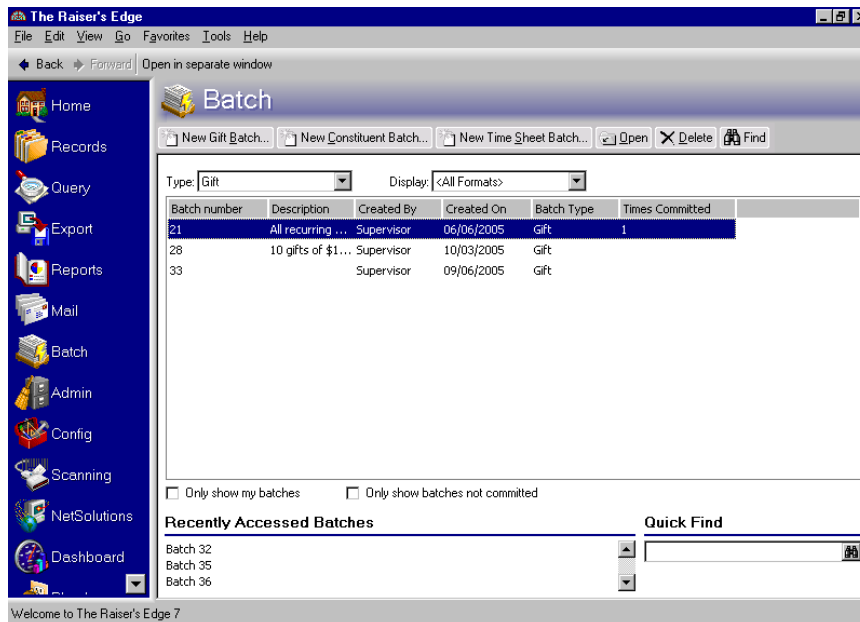
Deleting an Existing Batch

On occasion, you may want to delete a batch from your database. For example, after you commit a batch to your database, you may want to delete the batch to reduce the size of your database. You can delete a batch from the Batch page or the Data Entry screen. This section explains both methods to delete a batch from your database.

► Deleting an existing gift batch

Note: To delete multiple batches, you can also select **Tools, Delete Multiple Batches** from the menu bar of the Batch page. To access this option, you can also right-clicking on the Batch page. Once a batch is deleted, you cannot use the batch number again.

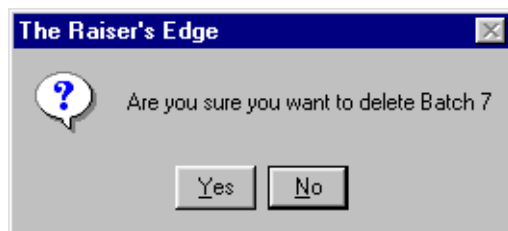
1. On the Raiser's Edge bar, click **Batch**. The Batch page appears.



2. In the grid, select the batch to delete.

Note: If you do not have security rights to delete a batch or **Other users may access this batch** is not marked and you did not originally create the batch, the message “User not authorized to delete this batch” appears.

3. On the action bar at the top of the screen, click **Delete**. A message appears.



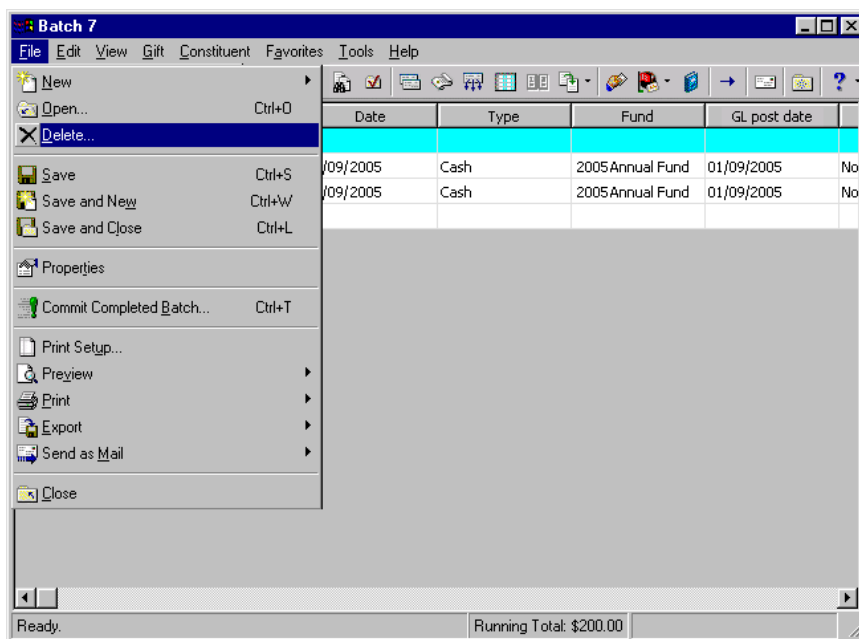
Warning: You cannot reuse a batch number even if you delete the batch associated with the batch number.

4. To delete the batch, click **Yes**. To return to the Batch page and not delete the batch, click **No**.

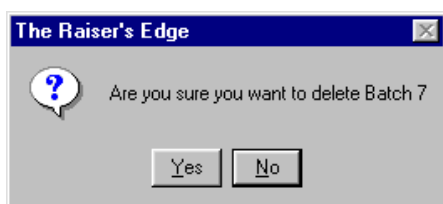
► Deleting an existing gift batch from the Data Entry screen

Note: To delete rows in a batch, you can also select the row to delete and right-click. From the right-click menu, select **Delete rows**.

1. From the Data Entry screen for a gift batch, select **File, Delete** from the menu bar. For more information about how to open a gift batch, see “Accessing a Gift Batch” on page 79.



The program displays a message.



2. To delete the batch, click **Yes**. To return to the Data Entry screen and not delete the batch, Click **No**.

Batch Reports

Note: You can print and preview batch reports before and after you commit a batch.

For gift batches, several reports are available to help track the gifts entered in a batch, record the settings selected when you commit a batch, and correct the exceptions generated when you commit a batch. This section explains the available reports and displays a sample of each report. If you use the optional module *Electronic Funds Transfer*, additional reports are available in *Batch*. For more information about EFT reports, see the *Electronic Funds Transfer (EFT) Guide*.

Batch Validation Report

To preview the Batch Validation Report, select **File, Preview, Validation Report** from the menu bar of a gift batch. The Batch Validation Report lists each field you enter in the batch in the order the fields appear in the batch. Before you print the Batch Validation Report, we recommend you preview it. To print the report, select **File, Print, Validation Report** from the menu bar of a gift batch. From the Batch Validation Report preview, you can select to print the Report or export the Report to another application. For more information about how to validate a batch, see “Validating a Batch” on page 200.

There are two types of validation reports — Summary and Detail. In User Options, you can select which type of validation report to create. For more information about how to select a validation report format, see “User Options” on page 83.

Summary Report

The summary report includes each field entered in the batch and lists the information included in each field. Any other information entered for the batch, such as membership and linked gift information, appears on the detail report. Note that any overpayments in the batch are included under **Gifts not included in the Total Amount**, and not as part of the total amount.

The screenshot shows a software window titled "New Batch Validation Report". The window has a standard Windows-style title bar with minimize, maximize, and close buttons. Below the title bar is a toolbar with various icons for navigation and printing. The main content area is divided into two sections. The top section is a table with the following data:

Constituent Name	Amount	Date	Type	Fund
Ms. Julie Marie Bach	\$1,000.00	07/07/2005	Cash	2005 Annual Fund
Mr. Max G. Taylor	\$50.00	07/10/2005	Cash	2005 Membership Fund
Ms. Stephanie Gail Smith	\$300.00	07/10/2005	Pledge	2005 Annual Fund

The bottom section contains summary information for the batch:

Batch #: 34
Description:
Created By: Supervisor
Batch Status: Open
Projected Amount: \$0.00
Projected No. of Gifts: 0
Running Amount: \$1,550.00
Running No. of Gifts: 3

Detail Report

The detail report includes each field entered in the batch and lists the information included in each field. In addition, the detail report includes all other information entered for gifts in the batch. For example, linked gifts, membership information, and matching gift information is included. Note that any overpayments in the batch are included under **Gifts not included in the Total Amount**, and not as part of the total amount.

10/03/2005				
Blackbaud Demo				
Batch Validation Report - Batch 28				
Constituent Name	Amount	Amount bills	Date	Type
GL post date	GL post status	Pay method		
Mark D. Adamson	\$100.00	\$100.00	10/03/2005	Cash
10/03/2005	Not Posted	Cash		
Solicitor		Amount		
Audrey Lorenz		\$100.00		
Ellen Crenshaw		\$100.00		
Membership Trans.	Member	Program.Category.Subcategory		
Renewal	Mark D. Adamson	Adopt an Animal Contributor Tiger		
Mohammed Rahman	\$100.00	\$100.00	10/03/2005	Cash
10/03/2005	Not Posted	Cash		
Honor/Memorial		Type		
Otto Montgomery		In Honor Of		
Bebe D. Kemp	\$100.00	\$100.00	10/03/2005	Cash
10/03/2005	Not Posted	Cash		
Campaign	Fund	Appeal	Package	
Annual Campaign	2002 Annual Fund			

Pre-Transmission Report

To preview the Pre-Transmission Report for a batch, selection **File, Preview, Pre-Transmission Report** from the menu bar of a gift batch. When you preview the Pre-Transmission report, a screen appears and asks you to include either electronic transactions, non-electronic transactions, or both in the report. You can also select to include the sponsoring bank in the report. Pre-Transmission reports are only available if you use the optional module *Electronic Funds Transfer*. For more information about EFT, see the *Electronic Funds Transfer (EFT) Guide*.

Pre-Transmission Report	
Sponsoring Bank: American Savings and Loan	
Include: <input type="radio"/> Electronic transactions	
<input type="radio"/> Non-electronic transactions	
<input checked="" type="radio"/> Both	
Preview Now	Cancel

Before you print the Pre-Transmission Report, we recommend you it. To print the report, select **File, Print, Pre-Transmission Report** from the menu bar of a gift batch. From the Pre-Transmission Report preview, you can select to print the Report or export the Report to another application. For more information about electronic and non-electronic transactions, see the *Electronic Funds Transfer (EFT) Guide*.

New Pre-Transmission Report

02/29/2005

Pre-Transmission Report

Transactions due on or before:
 Batch Created On: 02/29/2005 8:37:35 AM
 Batch Number: 11

Sponsoring Bank: American Savings and Loan - First Union Federal
 Account Name: Business Checking Account
 Account No.: 123456789
 User No.: 8888

Name	Amount	Payment Type	Bank Branch	Trans/Routin g No.	Account No.	Reference No.	Credit T
Max Taylor	\$100.00	Cash					
Stephanie Smith	\$300.00	Credit Card					Visa
Elizabeth Ashton	\$1,000.00	Cash					

Total Number of Direct Debits (Electronic):
 Total Amount of Direct Debits (Electronic): \$0.00

Total Number of Credit Cards (Electronic): 1
 Total Amount of Credit Cards (Electronic): \$300.00

Deposit Ticket

Note: When you mark **Consolidate split checks**, it determines whether cash gifts generated from overpayments of pledges are consolidated with the amount applied toward the pledge or are listed separately. Any gift with the same constituent, pay method, check number, and bank will be consolidated. For more information about pledge overpayments, see "Creating Cash Gifts for Pledge Overpayments" on page 169.

To preview the Deposit Ticket for a specific batch or all batches, select **File, Preview, Deposit Ticket** from the menu bar of a gift batch. When you select to preview the Deposit Ticket for a batch, you can click the **Include** button to select to include or exclude specific batches. When **Include batch for bank depositing** is marked on the Gift Batch Setup screen, you can print or preview the deposit ticket for a batch. Remember to set up bank information on the Financial Institutions page of *Configuration*.

The screenshot shows a 'Deposit Ticket' dialog box with the following fields and options:

- Include...** button and **All Batches** radio button.
- Deposit date:** 02/29/2005 (with a calendar icon).
- Deposit ticket no.:** 555.
- Bank/Branch:** American Savings and Loan(First Union Fede) (dropdown menu).
- Report format:** Detail and Summary (dropdown menu).
- Sort order:** Batch Order (dropdown menu).
- ☐ **Include selected payment types only** (with a **Payment Types...** button).
- ☒ **Consolidate split checks**.
- Preview Now** and **Cancel** buttons.

In the **Deposit Date** field, you can enter the date the funds will be deposited into your account. In the **Deposit ticket no.** field, you can enter a ticket number no more than 10 digits in length. The **Bank/Branch** is the name of your sponsoring bank. For **Report format**, you can select a detail or summary report, or both. You can also select how you want the report sorted. When you mark **Include selected payment types only**, the **Payment Types** button is enabled for you to select specific payment types to include in the report. You can also select to **Consolidate split checks** in the report as well.

Before you print the Deposit Ticket, we recommend you preview it. To print the report, select **File, Print, Deposit Ticket** from the menu bar of a gift batch. From the Deposit Ticket preview, you can select to print the Ticket or export the Ticket to another application. The following example is a Detail Deposit Ticket.

The screenshot shows a 'New Batch Deposit Ticket Report' preview window. The report is titled 'Blackbaud Demo Deposit Ticket' and is dated 02/29/2005. It displays the following information:

Blackbaud Demo
4401 Belle Oaks Drive

American Savings and Loan - First Union Fed
2261 Baylour Rd.
Union Square
San Francisco, CA 94125

Account Name: Business Checking Account
Account No.: 123456789

Deposit Ticket No.: 158
Deposit Date: 02/29/2005

Constituent Name	Constituent Id	Payment Type	Bank/Branch	Check/Card Number	Amount
1. Miss Bethany Margaret Taylor	156	Cash			\$50.00
2. Dr. Kate Andrea Williams	89	Cash			\$150.00
Total Cash:		\$200.00			
Total Check:		\$0.00			
Total Credit Card:		\$0.00			
		\$0.00			
Total Other:		\$0.00			

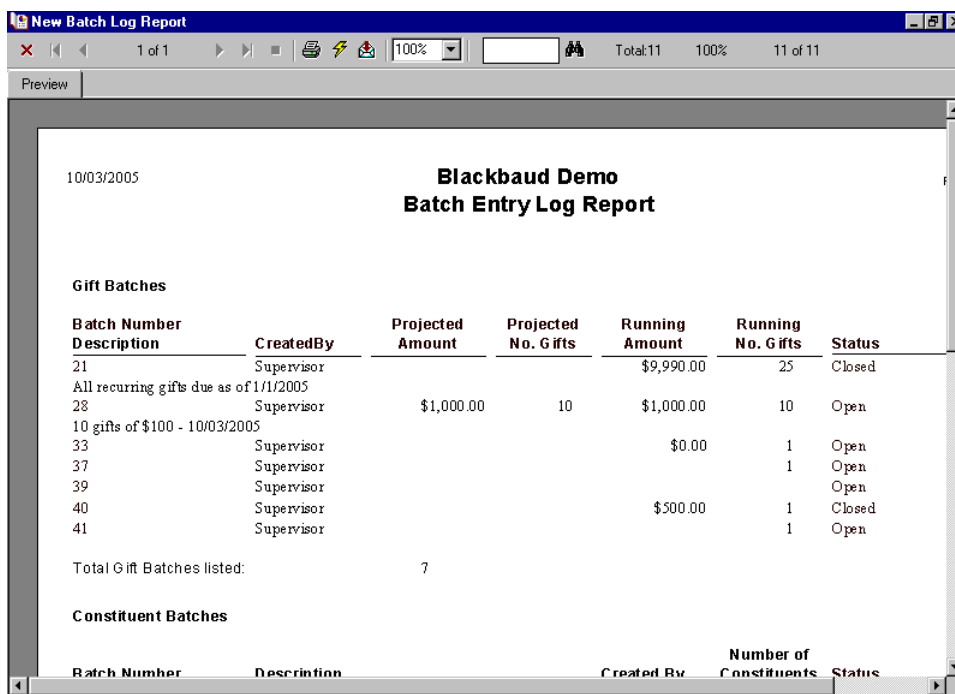
Batch Entry Log Report

To preview the Batch Entry Log Report, select **File, Preview, Batch Log** from the menu bar of a gift batch. You can select to preview constituent, gift, time sheet or all batches in the database. You can also select to preview open, closed, or all batches in the database.



The dialog box titled "Batch Log Report" contains two dropdown menus: "Batch type:" and "Batch status:", both set to "<All Batches>". There is an unchecked checkbox labeled "Include recurring batches". At the bottom are two buttons: "Preview Now" and "Cancel".

The Batch Entry Log Report lists information for all or selected batches in your database. For example, the Batch Entry Log Report can contain the batch description number, running amount of a batch, and running number of gifts in a batch. Before you print the Batch Entry Log Report, we recommend you preview it. To print the report, select **File, Print, Batch Log** from the menu bar of a gift batch. From the Batch Entry Log Report preview, you can select to print the Report or export the Report to another application.



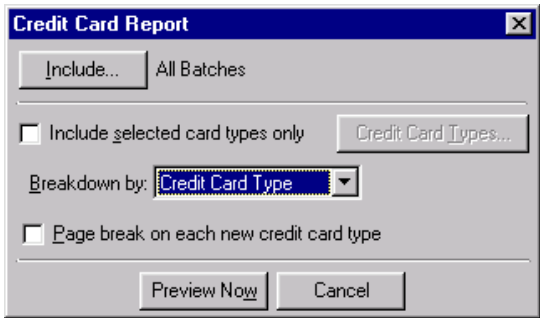
The preview window titled "New Batch Log Report" shows a report for "Blackbaud Demo" dated 10/03/2005. The report is titled "Batch Entry Log Report". It includes a table of "Gift Batches" with columns: Batch Number, Description, CreatedBy, Projected Amount, Projected No. Gifts, Running Amount, Running No. Gifts, and Status. Below the table, it states "Total Gift Batches listed: 7". There is also a section for "Constituent Batches" with columns: Batch Number, Description, Created By, Number of Constituents, and Status.

Batch Number	Description	CreatedBy	Projected Amount	Projected No. Gifts	Running Amount	Running No. Gifts	Status
21		Supervisor			\$9,990.00	25	Closed
All recurring gifts due as of 11/1/2005							
28		Supervisor	\$1,000.00	10	\$1,000.00	10	Open
10 gifts of \$100 - 10/03/2005							
33		Supervisor			\$0.00	1	Open
37		Supervisor				1	Open
39		Supervisor					Open
40		Supervisor			\$500.00	1	Closed
41		Supervisor				1	Open
Total Gift Batches listed:			7				

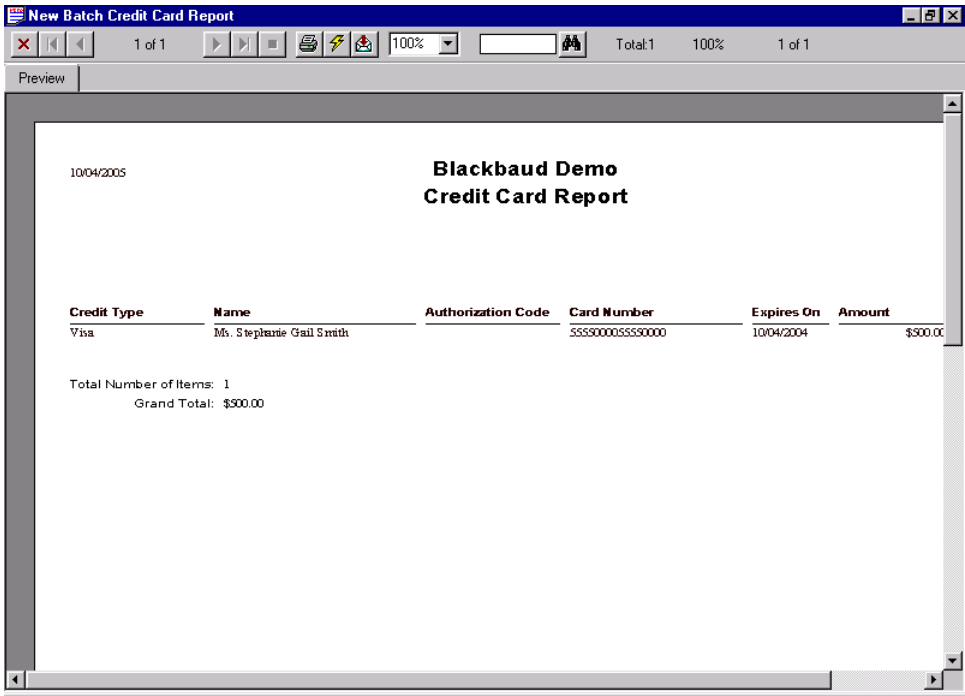
Batch Number	Description	Created By	Number of Constituents	Status
--------------	-------------	------------	------------------------	--------

Batch Credit Card Report

To preview the Batch Credit Card Report, select **File, Preview, Credit Card Report** from the menu bar of a gift batch. When you select to preview the Batch Credit Card Report, a screen appears and asks you to specify the batches to include in the report and by what criteria to break the report down. To view each new credit card type on a separate page, mark **Page break on each new credit card type**.

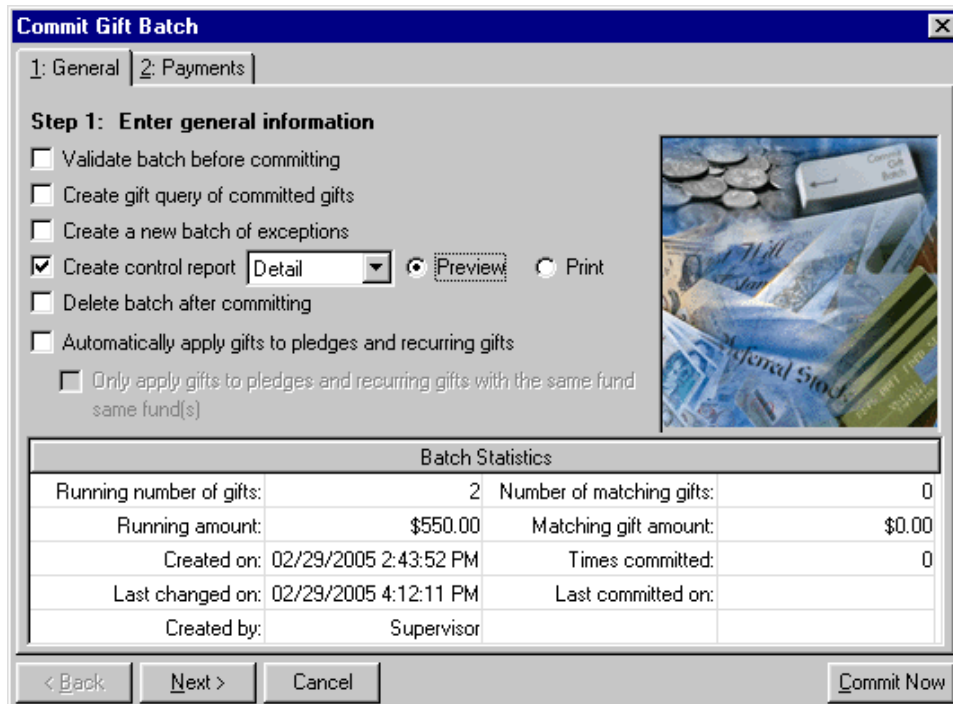


Before you print the Batch Credit Card Report, we recommend you preview it. To print the report, select **File, Print, Credit Card Report** from the menu bar of a gift batch. From the Batch Credit Card Report preview, you can select to print the Report or export the Report to another application.



Batch Commit Control Report

When you mark **Create control report** on the Commit Gift Batch screen, a control report previews or prints after you commit a batch to the database. The Batch Commit Control Report describes the batch you committed to the database and includes information such as the constituent name, amount for each gift, gift date, and total amount. To access the Commit Gift Batch screen, select **File, Commit Completed Batch** from the menu bar of a gift batch. For more information about this screen, see “Committing a Batch” on page 203.



Commit Gift Batch

1: General | 2: Payments

Step 1: Enter general information

☐ Validate batch before committing
☐ Create gift query of committed gifts
☐ Create a new batch of exceptions
☒ Create control report Detail Preview Print
☐ Delete batch after committing
☐ Automatically apply gifts to pledges and recurring gifts
☐ Only apply gifts to pledges and recurring gifts with the same fund same fund(s)

Batch Statistics

Running number of gifts:	2	Number of matching gifts:	0
Running amount:	\$550.00	Matching gift amount:	\$0.00
Created on:	02/29/2005 2:43:52 PM	Times committed:	0
Last changed on:	02/29/2005 4:12:11 PM	Last committed on:	
Created by:	Supervisor		

< Back Next > Cancel Commit Now

There are two types of control reports — Summary and Detail. When you mark **Create control report**, you must select which type of report to produce.

Summary Report

The summary report includes the name of each constituent entered in the batch and the total amount of gifts and number of gifts entered in the batch. The constituent names are formatted as you selected on the Batch tab of User Options. The summary control report includes the **Constituent Name, Constituent ID, Gift Type, Amount, Fund, and Gift Date** fields. At the bottom of the screen, the report lists the gifts not included in the total amount.

Batch 29 Control Report

1 of 1 100% Total: 3 100% 3 of 3

Preview

06/01/2005 **Blackbaud Demo** Page 1

Batch Commit Control Report - Batch 29

Query Name: Gifts Posted as Batch 29

Constituent Name	Constituent ID	Gift Type	Amount	Fund	Gift Date
Julie M. Bach	6	Pay-Cash	\$500.00	2005 Annual Fund	06/01/2005
Max G. Taylor	77	Pledge	\$1,000.00	2005 Annual Fund	06/01/2005

Projected Amount: \$0.00
Projected No. of Gifts: 0
Total Amount: \$1,500.00
Total No. of Gifts: 2

Payment Type	No. of Transactions	Total Amount
Cash	1	\$500.00
Personal Check	1	\$1,000.00

Gift not included in the Total Amount

Matching Gifts
Matching Gift Amount: \$0.00
No. of Matching Gifts: 0

Payments added using 'Add Payment to Pledge'
Pledge Pay Amount: \$0.00
No. of Pledge Pays: 0

Payments added using 'Add Payment to Recurring Gift'
Transaction Amount: \$0.00
No. of Transactions: 0

Detail Report

The detail report includes the name of each constituent entered in the batch. The constituent names are formatted as you selected on the Batch tab of User Options. The detail control report includes the **Constituent Name, Constituent ID, Gift Type, Amount, Fund, and Gift Date** fields. The report also includes information specific to each gift such as tribute, solicitor, and event details.

Batch 21 Control Report					
1 of 1+					
Total: 76 100% 76 of 76					
Preview					
06/01/2005					
Blackbaud Demo					
Batch Commit Control Report - Batch 21					
Page 1					
Query Name: Gifts Posted as Batch 21					
Constituent Name	Constituent ID	Gift Type	Amount	Fund	Gift Date
Anne C. Sinclair	76	Pay-Cash	\$500.00	Botanical Garden Fund	04/11/2005
Matching Gift Co.		Amount	Date	Fund	
Wesley & Sons		\$1,000.00	06/06/2005	Botanical Garden Fund	
Summerville Land & Lumber		\$500.00	06/06/2005	Botanical Garden Fund	
Pledge Applied To	Constituent	Amount Applied			
04/11/2005	Anne Sinclair	\$500.00			
Geoffrey T. Beckner	5	Pay-Cash	\$1,000.00	2005 Annual Fund	02/10/2005
Pledge Applied To	Constituent	Amount Applied			
02/10/2005	Geoffrey Beckner	\$1,000.00			
Catlin R. Daly	14	Pay-Cash	\$455.00	Botanical Garden Fund	03/15/2005
Pledge Applied To	Constituent	Amount Applied			
03/15/2005	Catlin Daly	\$455.00			
Jennifer A. Kennick	42	Pay-Cash	\$3,000.00	2005 Annual Fund	07/22/2005
Pledge Applied To	Constituent	Amount Applied			
07/22/2005	Jennifer Kennick	\$3,000.00			
Collin Dubose	93	Pay-Cash	\$750.00	Botanical Garden Fund	09/05/2005
Matching Gift Co.		Amount	Date	Fund	
New Mexico Gas & Electric		\$750.00	06/06/2005	Botanical Garden Fund	
Pledge Applied To	Constituent	Amount Applied			
09/05/2005	Collin Dubose	\$750.00			

Batch Commit Exception Report

When you commit a batch to the database, the Commit Batch screen appears and displays the number of gifts that were and were not committed to the database. Gifts that were not committed are called exceptions. If there are exceptions, the **Exception Report** button is enabled on the Commit Batch screen. To preview the Batch Commit Exception Report, click **Exception Report**.



The Batch Commit Exception Report contains information for the gift exceptions that were not committed to the database. An example of an exception is a declined credit card.

When the Batch Commit Exception Report preview appears, you can select to print the Report or export the Report to another application. We recommend you view and print the Batch Commit Exception Report so you can see which gifts are not committed to the database and why. For more information about how to commit a batch to the database, see “Committing a Batch” on page 203.

07/10/2005

Blackbaud Demo
Batch Exception Report - Batch 37

Exception Batch: 36

Exceptions

Constituent Name	Gift Type	Amount	Gift Date	Reason for Exception
Ms. Julie Marie Bach	Cash	\$5,000.00	07/10/2005	Gift ID must be unique

Total Exceptions listed: 1

Time Sheet Batch



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Warning: Time sheet batches are only available if you use the optional module *Volunteer Management*. For more information about how to add time sheets from the Volunteer tab of a constituent's record, see the *Volunteers & Jobs Data Entry Guide*.

To add time sheet information to the database, you can use the Volunteer tab on a constituent's record. From this tab, you can create a new time sheet and view existing time sheets. When you add many new time sheets to the database at once, this process may take a long time depending on the number of time sheets you add. *Batch* is an alternative method to add constituents, gifts, and time sheets to your database. With *Batch*, you can enter and update information on constituent and gift records quickly because you do not need to open each individual constituent or gift record to add or update information. You can also create new time sheet batches to commit to the database. It is important to note that time sheet batches work very similar to constituent batches. Once you add new constituents to a batch and commit the batch, all the committed information is removed from the batch. Time sheet batches work the same way. Once you add new time sheet information to a batch and commit the batch, the information is then removed from the batch.

Warning: Do not confuse time sheets with job assignments. A time sheet tracks the hours a volunteer worked on a particular day at a job assignment. For more information about how to add time sheets from the Volunteer tab of a constituent's record, see the *Volunteers & Jobs Data Entry Guide*.

A time sheet summarizes the hours a volunteer worked at a particular job on a particular date and calculates the value of that time. To add a Volunteer time sheet, you can create a new time sheet batch from the Batch page in *The Raiser's Edge*. Once you create a new time sheet batch, you can search for the volunteer's name and for the job you assigned the volunteer. You can add information to the batch such as hours worked and position worked. On the time sheet, you can track job information such as the department under which the job falls, the location where the job takes place, and the particular task performed. When you commit the time sheet batch, the time sheet information is added to the Volunteer tab of a constituent's record. For more information about volunteers and jobs, see the *Volunteers & Jobs Data Entry Guide*. This chapter focuses on time sheet batches. For more details about constituent and gift batches, see "Constituent Batch" on page 1 and "Gift Batch" on page 71.

Batch Setup Information

Before you begin to work with time sheet information in *Batch*, it is important that you understand some basic, setup information that will help you process time sheets in a batch. The following sections outline the information you need to be aware of before you process time sheets in a batch. The sections also offer a basic overview and direct you to more detailed sections and procedures in this chapter to help you get started. Setup information includes user options and business rules, as well as batch templates.

User Options

User options are preferences you set that affect how *The Raiser's Edge* looks and runs on the workstation you use. User options are login-specific, which means if you use your password to log into any workstation, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. It is important to set up user options before you begin to work with time sheets in a batch. Several user options are specific to *Batch*. For example, you can automatically save an open batch at specified time intervals, select the format for constituent names in batch reports, and specify how you want to add default entries to a batch. For time sheet batches, you can set user options to:

- Automatically save a batch when you close out of the batch.
- Automatically save a batch at regular intervals, such as every five minutes.
- Specify how constituent names appear when you work with them in a gift batch.
- Automatically ask you to save the batch before you save information in a Constituent Window.
- Display the default row in the first row of the Data Entry grid.

- Specify whether to enter defaults in your batch when you press **F2** within a field, select a field, or begin a new row in the batch.
- Specify individual and organization report formats.
- Specify a color in the default row of a time sheet batch row.

For detailed information about how to set these user options, see “User Options” on page 232.

Business Rules

When you set business rules, you can control certain functions and displays in *The Raiser’s Edge*. Unlike user options, business rules affect all users of the program. Several business rules affect the way you use *Batch*. For example, each time sheet batch has a unique batch number associated with it. In business rules, you can select a meaningful format for the batch number. For time sheet batches, you can set business rules to specify batch numbers and select the format in which you want them to appear.

For detailed information about how to set these business rules, see “Business Rules” on page 237.

Batch Templates

When you work with batches, you can easily create a new batch based on an existing batch, therefore creating a “template” so to speak. To create a batch template, you simply search for an existing batch in your database and copy the batch field list from that existing batch into your new batch. When you copy a field list to a new batch, you essentially use the existing batch as a template. In your new batch, you can also add additional fields and remove unnecessary fields as needed.

To copy a field list from another batch, click **Load from Existing Batch** on the Fields tab of the Time Sheet Batch Setup screen. This feature saves you time because you do not need to re-create a field list you already used in another batch. When you load fields from another batch, the program replaces any fields in the **Data entry fields** box with the fields selected in the existing batch. When you click this button, the Open screen for batches appears so you can search for the existing batch from which to copy fields. After you select the **Data entry fields** for a batch and save the batch, you can copy the field list to use as a template when you create a new batch. For more information about how to create batch templates, see “Creating a Batch Template by Loading Fields from an Existing Batch” on page 245.

Frequently Used Terms

This section defines words and phrases you need to know as you work with batch information. If you come across an unfamiliar term when you read this or any chapter of *The Raiser’s Edge* documentation, make sure you check the online glossary in the help file.

Batch. Batch is a method of data entry you can use to quickly create many new constituent, gift, or time sheet records. There are three types of batches: constituent, gift, and time sheet. A batch resembles a spreadsheet and each row of the spreadsheet contains information for a single gift, constituent, or time sheet record.

Data entry grid. When you set up a time sheet batch, you define the columns that appear in the Data Entry screen from the Fields tab of the Time Sheet Batch Setup screen. The columns list in the order you select on the Fields tab.

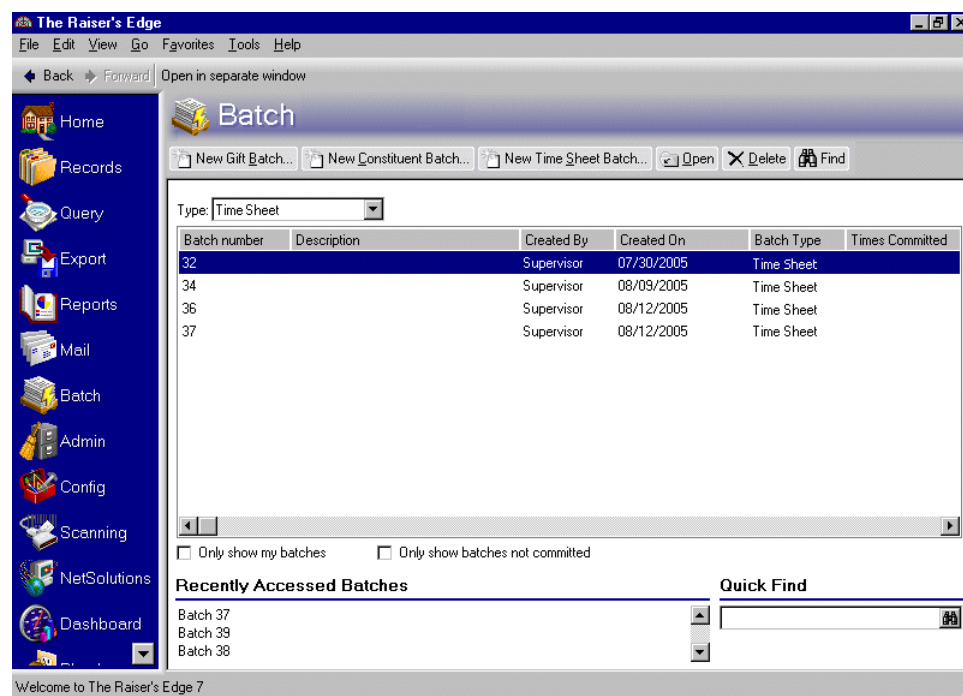
Default row. When displayed, the Default Row is the first row in the Data Entry grid and contains the default values you selected on the Defaults tab of the Time Sheet Batch Setup screen. When you add time sheet information to the batch, any information entered in the Default Row can appear as a default for each new time sheet in the batch. In User Options, you can display or hide the Default Row, choose a color in which to display this row, and select how to add the defaults for each time sheet.

Time sheet. A time sheet summarizes the hours a volunteer worked at a particular job on a particular date and calculates the value of that time. To add a Volunteer time sheet, create a new time sheet batch from the Batch page in *The Raiser's Edge*. For more information about volunteer and job information, see the *Volunteers & Jobs Data Entry Guide*.

Validate. When you validate a batch, the program checks the batch to make sure that the volunteer for whom you add a time sheet is a constituent in your database. The program also makes sure the job record you specify exists in the database. When you validate the time sheet batch, the program alerts you of any exceptions. If no changes are made to the batch and you commit the batch to the database, the exceptions will not commit to the database.

Navigating in Batch

From the Batch page, you can create new time sheet batches and access existing time sheet batches. To access the Batch page, click **Batch** on the Raiser's Edge bar.



The grid displays all the constituent, gift, and time sheet batches in your database. To create a new time sheet batch, click **New Time Sheet Batch**. To narrow the batches that display in the grid, use the **Type** and **Display** fields. For example, to display only time sheet batches in the grid, select Time Sheet in the **Type** field. You can also mark **Only show my batches**. When you mark this checkbox, you specify that only batches you create appear in the grid. When you mark **Only show batches not committed**, you specify that only non-committed batches appear in the grid. The Batch page also contains a list of recently accessed batches. To open any batch in this list, click the batch. To quickly find a batch, enter a batch number in the **Quick Find** field and click the binoculars to display the Data Entry screen for the batch that matches your entry.

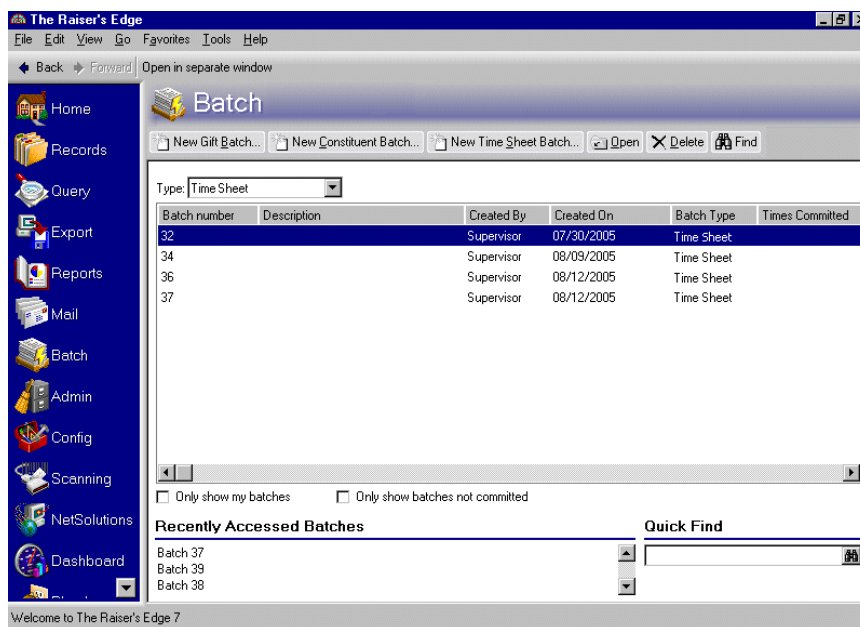
Accessing a Time Sheet Batch

Note: If you do not have security rights to open a time sheet batch or **Other users may access this batch** is not marked and you did not originally create the batch, you receive the message “User not authorized to access this batch.”

From the Batch page, you can open any constituent, gift, or time sheet batch in your database. To open a batch, you must have appropriate security rights. For more information about security, see the *Configuration & Security Guide*. Also, if **Other users may access this batch** on the Time Sheet Batch Setup screen is not marked for the batch, you cannot open the batch unless you originally created the batch.

► Opening a time sheet batch from the Batch page

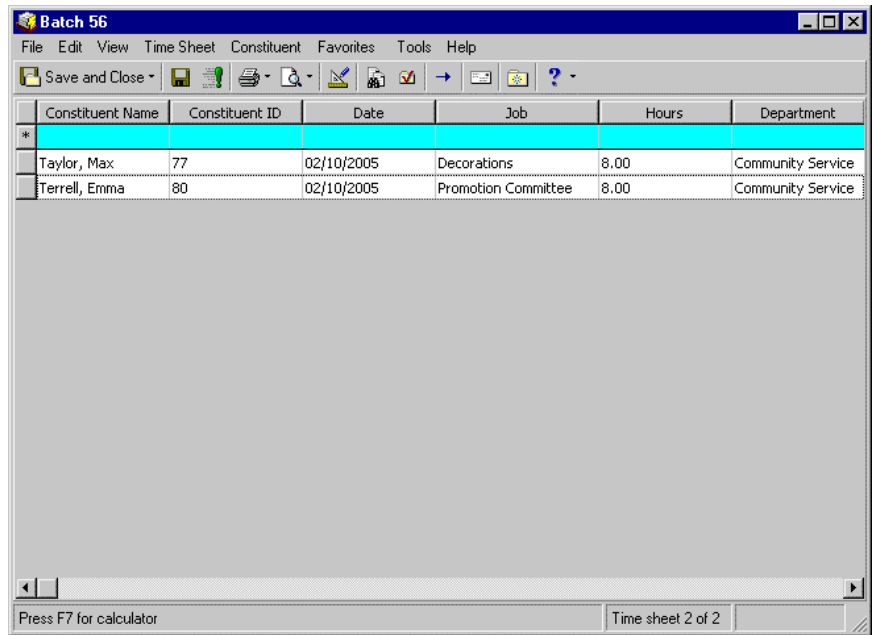
1. On the Raiser's Edge bar, click **Batch**. The Batch page appears.



Tip: To narrow the number of batches that appear in the grid, select Time Sheet in the **Type** field. The **Display** field affects whether recurring or non-recurring gift batches appear in the grid.

2. In the grid, select the time sheet batch to open.

3. On the action bar at the top of the page, click **Open**. The Data Entry screen appears.

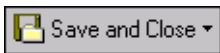


4. Make any necessary changes to the batch and click **Save and Close** on the toolbar. You return to the Batch page.

Batch Toolbar

Note: You can set up a user option that enables you to view tooltips that explain the function of each toolbar command. Tooltips appear when you move your cursor across each item on the toolbar. For more information about how to set up this user option, see the User Options chapter of the *Program Basics Guide*.

The toolbar contains buttons that represent common commands for a time sheet batch. To save time during data entry, you can use these buttons as alternatives to menu commands.



Save and close the time sheet batch (**Save and New** can be accessed from the down arrow beside **Save and Close**. Use **Save and New** to save the batch, close the saved batch, and open a new batch.)



Save the time sheet batch



Commit the time sheet batch to the database



Print a report – Click the down arrow and select a report to print.



Preview a report – Click the down arrow and select a report to preview.



Access the Time Sheet Batch Setup screen



Check for duplicate time sheet information in the batch



Validate the time sheet batch



Go to the constituent



Access AddressAccelerator screen



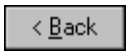
Add time sheet batch to favorites



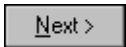
Access help from online help files, user guides, online support, or the Blackbaud Web site

Buttons

At the bottom of the Time Sheet Batch Setup screen, several buttons appear to help you navigate through the tabs and set up your batch.



Go to the previous tab



Go to the next tab



Close the screen



Save the time sheet batch setup



Open the Data Entry screen for a time sheet batch

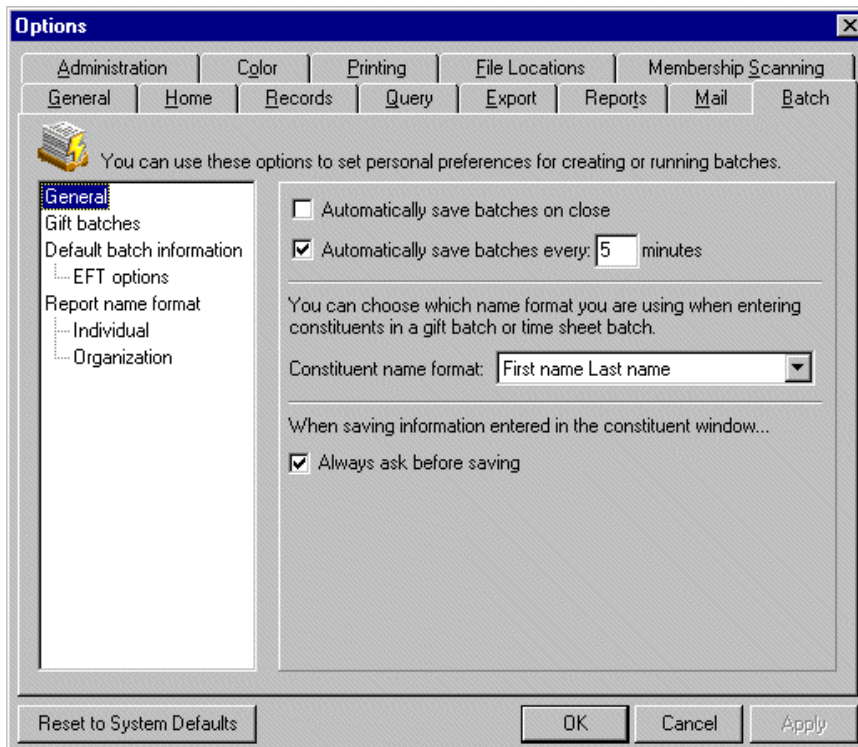
User Options

User options are preferences you set that affect how *The Raiser's Edge* looks and runs on the workstation you use. User options are login-specific, which means that if you use your password to log into any workstation, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. Several user options are specific to *Batch*. For example, you can automatically save an open batch at specified time intervals, select the format to enter constituent names in a time sheet batch, and specify how to add default entries to a batch. For more information about User Options, see the *Program Basics Guide*.

► Defining user options

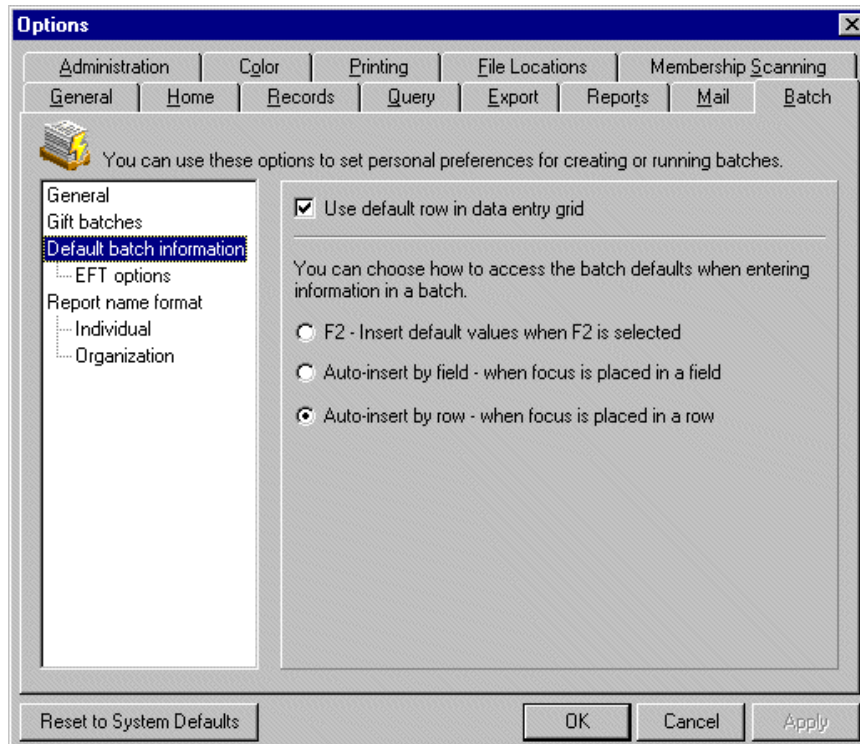
This procedure explains how to set up user options specific to *Batch*. For complete information about User Options, see the *Program Basics Guide*.

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools, User Options**. The Options screen appears.
2. Select the Batch tab.
3. From the tree view on the left side of the Options screen, select **General**. General batch options appear on the right side of the screen.



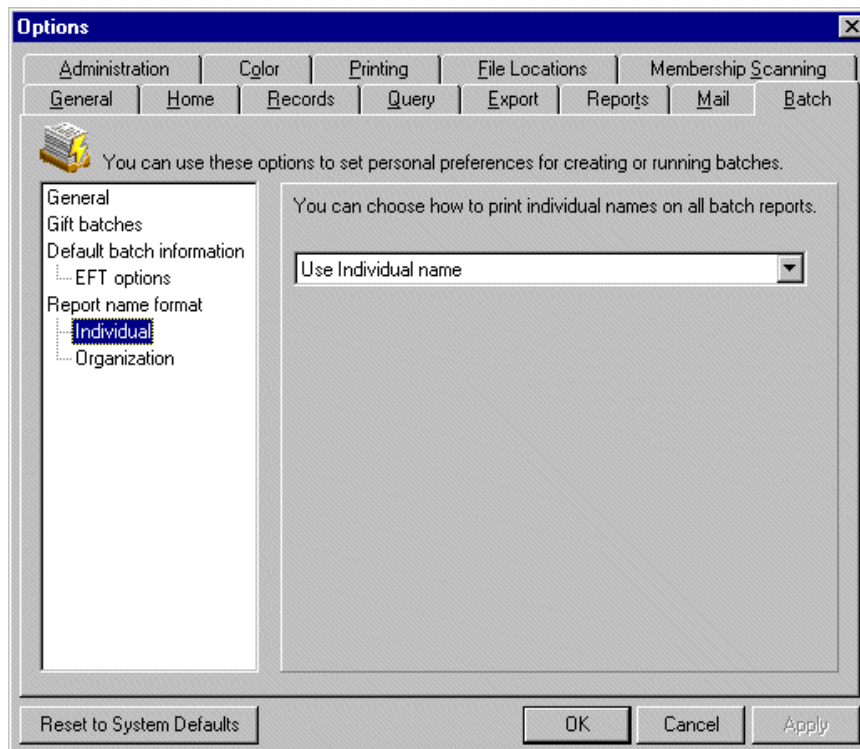
4. To automatically save the information entered in a batch when you close the Data Entry screen, mark **Automatically save batches on close**.
5. To automatically save the information entered in an open batch at regular intervals, mark **Automatically save batches every [] minutes**. When you mark this checkbox, enter the time interval used to automatically save the batch. For example, to automatically save an open batch every five minutes, enter "5" in the field.
6. In the **Constituent name format** field, select the format for the constituent names you enter in a batch. For example, to have the first name appear before the last name for a constituent, select "First name Last name".

7. To set the program to display a message before it updates the database with information entered in the constituent window, in the **When saving information entered in the constituent window** frame, mark **Always ask before saving**.
8. From the tree view on the left side of the Options screen, select **Default batch information**. The default options appear on the right side of the screen.



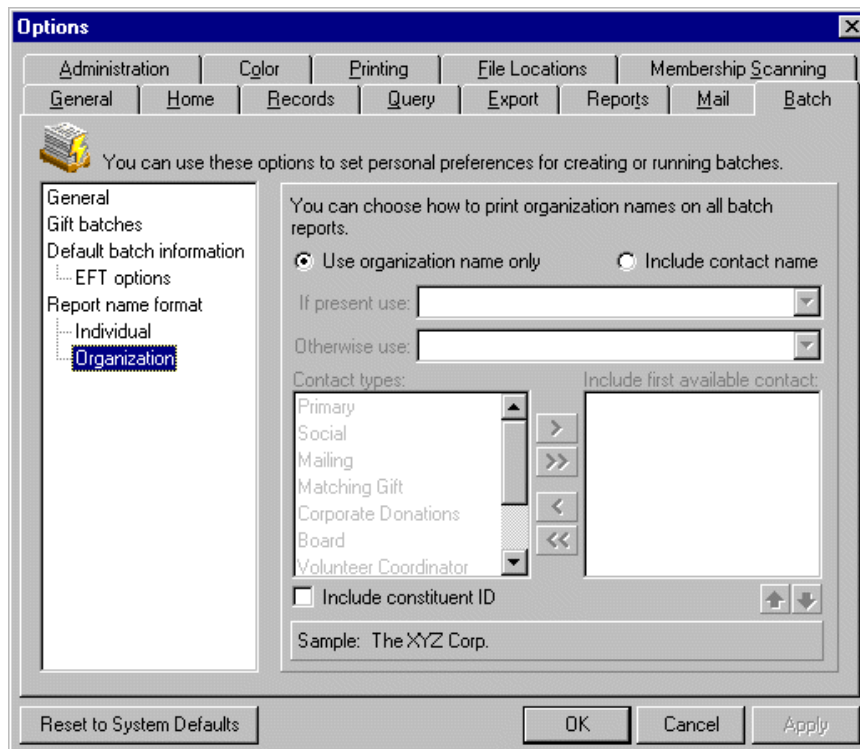
9. To display the default row in the first row of the Data Entry grid, mark **Use default row in data entry grid**.
10. Select whether to enter defaults in your batch when you press **F2** within a field, select a field, or begin a new row in the batch.
11. From the tree view on the left side of the Options screen, you can select **EFT options**. This option is available only if you use the optional module *Electronic Funds Transfer*. For more information about this user option, see the User Options section of the *Electronic Funds Transfer (EFT) Guide*.

12. From the tree view on the left side of the Options screen, select **Individual** under the **Report name format** heading. The individual name options appear on the right side of the screen.



13. In the **You can choose how to print individual names on all batch reports** field, select Use addressee from Individual, Use addressee from Configuration, or Use Individual name. If you select Use addressee from Individual or Use addressee from Configuration, additional fields appear on this screen so you can select the specific addressee to use.

14. From the tree view on the left side of the Options screen, select **Organization** under the **Report name format** heading. The individual name options appear on the right side of the screen.



15. In the **You can choose how to print organization names on all batch reports** field, select **Use organization name only** or **Include contact name**. If you select **Include contact name**, additional fields become enabled so you can select the specific contacts to include.
16. If you mark **Include contact name**, select a format for the contact name in the **If present use** field. If that format is not entered on the contact's constituent record, select an alternative in the **Otherwise use** field.
17. To select the contact types to include, select a contact type in the **Contact types** box and click the right arrow to move it to the **Include first available contact** box. If you include multiple contact types, use the up and down arrows to arrange them in order of importance.

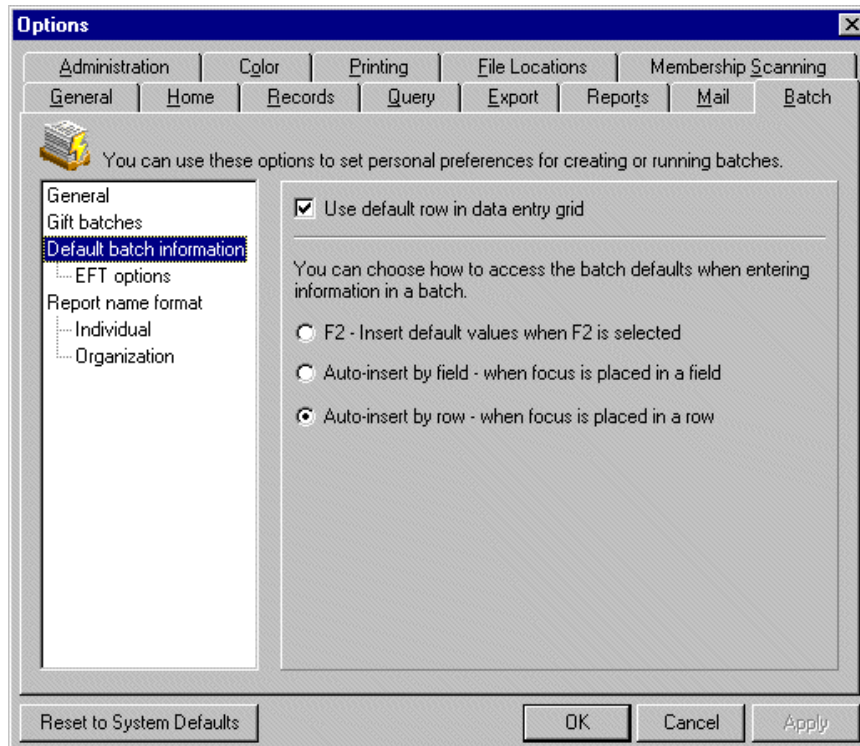
Note: To undo any changes you made and reestablish all program settings, click **Reset to System Defaults**.

18. To include the constituent ID at the end of the organization name, mark **Include constituent ID**.
19. To save your changes, click **OK**.

► Displaying the default row

- From the menu bar on the shell of *The Raiser's Edge*, select **Tools, User Options**. The Options screen appears.

2. Select the Batch tab.

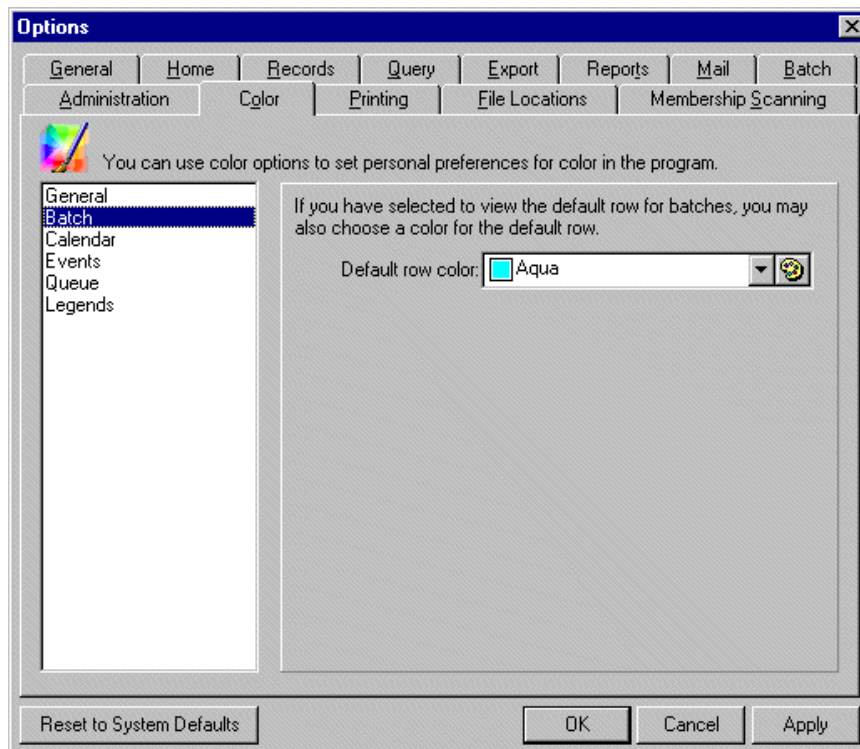


3. From the tree view on the left side of the Options screen, select **Default batch information**. The default options appear on the right side of the screen.

Note: If you hide the Default Row, it does not affect your ability to add defaults to a batch. The Default Row is a tool to see and easily change the current default settings for a batch.

4. To display the default row in the first row of the Data Entry grid, mark **Use default row in data entry grid**.
5. Select whether to enter defaults in your batch when you press **F2** within a field, select a field, or begin a new row in the batch.
6. Select the Color tab.

7. From the list on the left side of the Options screen, select **Batch**. The color options for the Default Row appear on the right side of the screen.



8. In the **Default row color** field, select the color in which to display the Default Row.
9. To save your change, click **OK**.

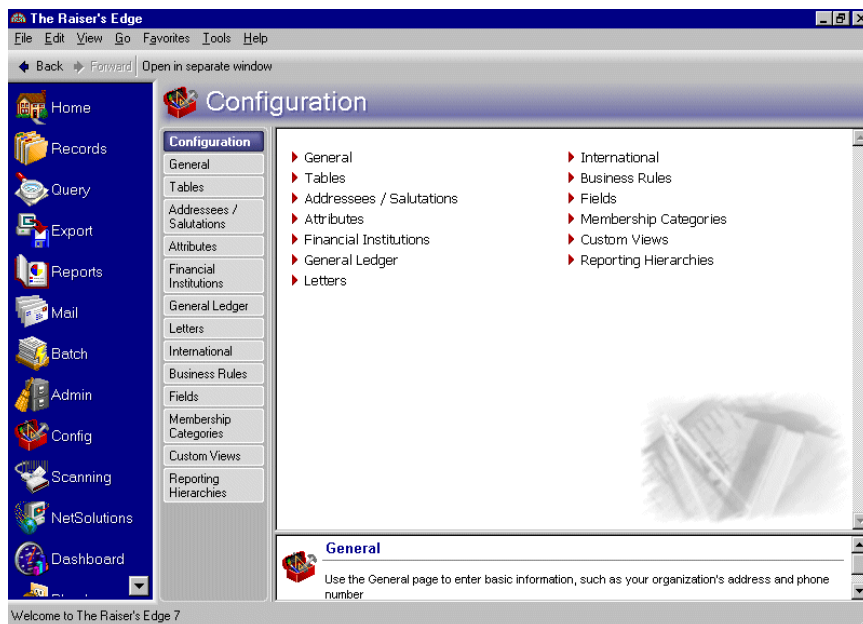
Business Rules

When you set business rules, you control certain functions and displays in *The Raiser's Edge*. Unlike user options, business rules affect all users of the program. Several business rules affect the way you use *Batch*. For example, each constituent, gift, and time sheet batch has a unique batch number associated with it. In business rules, you can select a meaningful format for the batch number.

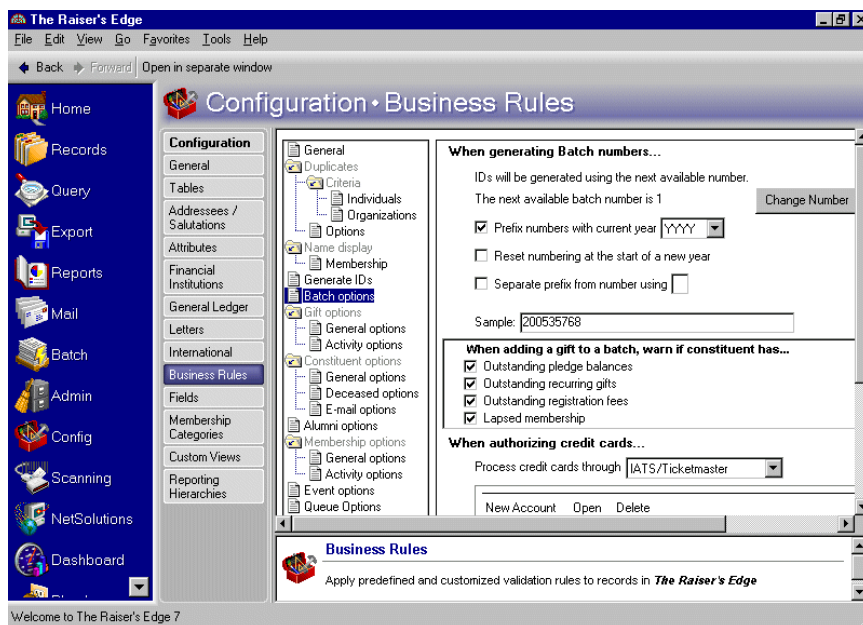
► Defining the batch number format

Before you begin to use *Batch*, you must decide how to format the batch numbers. Constituent, gift, and time sheet batches use the same format, and batch numbers are not duplicated between the three types of batches. For example, if you create a time sheet batch with a batch number of 2005-193, the program cannot create a gift batch that has the same number.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.

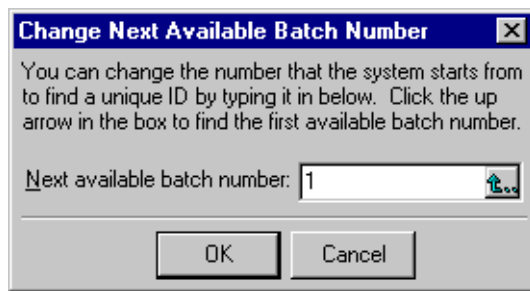


2. Click **Business Rules**. The Business Rules page appears.
3. On the Business Rules page, select **Batch options** from the tree view on the right side of the screen. The Business Rules screen appears on the left side of the screen with the batch-related options.



Note: When you create a new batch, the program updates the next available batch number listed in the **When generating Batch numbers** frame. The program uses this number as a reference point to begin searches for the next unused batch number.

4. To generate batch numbers, *The Raiser's Edge* searches for the lowest available number that occurs after the batch number listed in the **When generating Batch numbers** frame. To find and change the reference number the program uses to find a unique batch number, click **Change Number**. When you click **Change Number**, the Change Next Available Batch Number screen appears.



5. In the **Next available batch number** field, enter the number you want the program to use when it begins a search for the next unique batch number. If you click the search button in the **Next available batch number** field, the program searches for the next unique batch number available.
6. Click **OK**. You return to the Business Rules page.
7. To display the year the batch is created before the batch number, mark **Prefix numbers with current year**. When you mark this checkbox, select whether to display the year in two or four characters.

Note: Batch numbers must be unique, so before you can **Reset numbering at the start of a new year**, you must mark **Prefix numbers with current year**.

8. If you include the year before a batch number, **Reset numbering at the start of a new year** is enabled. When you mark this checkbox, the program resets the next available batch number to 1 at the beginning of the year.
9. If you include the year before a batch number, **Separate prefix from number using** is enabled. When you mark this checkbox, enter the symbol to separate the sections of a batch number. For example, if you enter a hyphen in this field, the program formats the batch number as 2005-35768.
10. The **Sample** display shows an example of the batch number with the format options you select. If this display does not show the batch number as you want it to appear, modify the settings on this page.
11. After you change business rules, your changes are updated right away.

The Life of a Batch

This chapter explains each step in the life of a time sheet batch and provides examples and procedures for each process. Regardless of whether you use a constituent, gift, or time sheet batch, every batch goes through the following steps.

Setup. Before you add time sheet information to a batch, you must set up a batch. To set up a batch, select a batch number, define the fields to enter for each time sheet, and specify any necessary defaults for these fields. For example, to create a time sheet batch to add the hours worked and specific jobs for a constituent, you can select the appropriate time sheet data fields when you set up the batch. For more information about how to set up a time sheet batch, see “Time Sheet Batch Setup” on page 240.

Note: The program uses a batch number to identify a specific batch. Each constituent, gift, and time sheet batch must have a unique batch number.

Data Entry grid. The Data Entry grid is a spreadsheet. Every field you select to appear in the batch has a column in the spreadsheet. When you add a time sheet batch, you add each new time sheet on a separate row. For more information about how to enter data into a time sheet batch, see “Time Sheet Batch Data Entry” on page 254.

Validation. When you finish adding time sheet data to your batch, you can validate the batch. When you validate a batch, the program determines if any errors in data entry will prevent time sheets in the batch from being successfully added to your database. For more information about how to validate a time sheet batch, see “Validating a Batch” on page 285.

Commit a batch to the database. When you commit a time sheet batch to the database, the program transfers the information entered in the batch to create new time sheet records. For more information about how to commit a time sheet batch, see “Committing a Batch” on page 287.

Time Sheet Batch Setup

To use *Batch* to add time sheets to your database, you must first define basic information about the batch to set up a batch. This information includes the batch number, the fields present in the batch, and defaults for these fields. When you click **New Time Sheet Batch** on the Batch page to create a new time sheet batch, the Time Sheet Batch Setup screen appears. At the Time Sheet Batch Setup screen, you can view and define basic information about the batch.

Time Sheet Batch Setup

1: Batch Header | 2: Fields | 3: Defaults

Batch Statistics			
Number of time sheets:	0	Last committed on:	
Created on:	07/30/2005 2:22:02 PM	Created by:	Supervisor
Last changed on:	08/13/2005 10:51:04...		

Batch number: 32

Description: Time sheet for constituents who worked in Lawn Care on 08/03/2005

☒ Other users may access this batch

Press F7 to zoom

< Back | Next > | Cancel | Save | Data Entry

The Time Sheet Batch Setup screen is divided into three tabs: Batch Header, Fields, and Defaults. At the bottom of each tab, several buttons are available to help you move between the tabs. For more information about the buttons on this screen, see “Buttons” on page 231.

Batch Header Tab

On the Batch Header tab, you select a batch number and enter a description to explain the contents of the batch. This tab also displays **Batch Statistics**, which includes the number of time sheets in the batch and the name of the user who created the batch.

The screenshot shows the 'Time Sheet Batch Setup' dialog box with the 'Batch Header' tab selected. The 'Batch Statistics' section displays the following information:

Batch Statistics			
Number of time sheets:	0	Last committed on:	
Created on:	07/30/2005 2:22:02 PM	Created by:	Supervisor
Last changed on:	08/13/2005 10:51:04...		

Below the statistics, the 'Batch number' is set to 32, and the 'Description' is 'Time sheet for constituents who worked in Lawn Care on 08/03/2005'. The checkbox 'Other users may access this batch' is checked. At the bottom, there are buttons for '< Back', 'Next >', 'Cancel', 'Save', and 'Data Entry'. A status bar at the bottom left says 'Press F7 to zoom'.

Batch Statistics

At the top of the Batch Header tab, the **Batch Statistics** grid displays a variety of information, such as:

- The number of time sheets currently entered in the batch.
- The user name for the person who originally created the batch.
- The date and time the batch was created, last changed, and last committed.

Although you cannot edit this information, the program updates this grid every time you save the batch.

Number of time sheets. The **Number of time sheets** display shows the number of time sheets currently entered in this batch.

Created on. The **Created on** display shows the date and time the batch was first created.

Note: System dates and times are formatted as you specify in the **Short Date Style** field on the Date tab and the **Time Style** field on the Time tab of the Regional Settings Properties screen. To access this screen, open the Windows Control Panel and click **Regional Settings**.

Last changed on. The **Last changed on** display shows the date and time the batch was last changed. A date and time does not appear in the **Last changed on** display until you save the batch for the first time. Then, the date is updated every time you save the batch. If the batch is open on more than one workstation, the **Last changed on** display shows the date and time the main database was last updated.

Last committed on. The **Last committed on** display shows the date the batch was last committed to the database. A date does not appear in this field until you commit the batch.

Created by. The **Created by** display shows the user name of the person who originally created the batch. For example, if this batch was created by the Supervisor, “Supervisor” appears in this display.

Batch Numbers

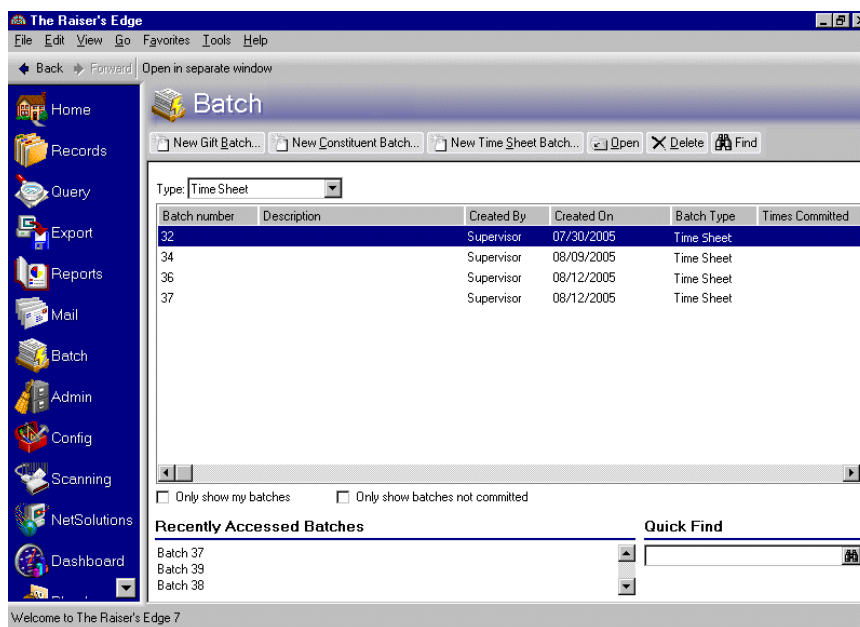
The Raiser’s Edge tracks each constituent, gift, and time sheet batch with a unique number, called a batch number. When you create a new batch, the program automatically generates a batch number and assigns it to the batch. You can choose to use this number or select your own number. If you select your own number, you can assign numbers and letters to the batch you create.

When the program generates a batch number, it selects the lowest unused batch number and formats the batch number based on specifications you entered in *Configuration*. To define this format, click the **Business Rules** link on the *Configuration* page. For information about how to define the batch number format, see “Defining the batch number format” on page 238. If you select your own batch number, verify that this batch number has not been used for another constituent, gift, or time sheet batch. Regardless of how you select the batch number, it must be unique for each batch you create.

When you open a batch, the batch number appears in the top corner of the screen. When you click on the Batch page, you can also see the batch number next to each corresponding batch in the grid.

► Determining whether a batch number has been used

1. On the Raiser’s Edge bar, click **Batch**. The Batch page appears.



2. Click **New Time Sheet Batch**. The Time Sheet Batch Setup screen appears.

3. Select the Batch Header tab.

The screenshot shows the 'Time Sheet Batch Setup' dialog box with the 'Batch Header' tab selected. The 'Batch Statistics' section contains the following data:

Batch Statistics			
Number of time sheets:	0	Last committed on:	
Created on:	07/30/2005 2:22:02 PM	Created by:	Supervisor
Last changed on:	08/13/2005 10:51:04...		

Below the statistics, the 'Batch number' field is set to 32, and the 'Description' field contains 'Time sheet for constituents who worked in Lawn Care on 08/03/2005'. The checkbox 'Other users may access this batch' is checked. At the bottom, there are buttons for '< Back', 'Next >', 'Cancel', 'Save', and 'Data Entry'. A status bar at the bottom left says 'Press F7 to zoom'.

4. Click the batch number lookup button next to the **Batch number** field. The Open screen for batches appears.

The screenshot shows the 'Open' dialog box for batch number lookup. The 'Find' dropdown is set to 'Batch'. The search results table is as follows:

Batch Number	Batch Description	Batch Type	Date Added	Ad
33		Gift	08/08/2005	Supervisor

Below the table, there are search criteria fields: 'Batch number' (33), 'Batch description' (blank), 'Batch type' (Timesheet), 'Created on' (blank), 'Created by' (blank), and 'Last committed on' (blank). There are also checkboxes for 'Exact match only', 'Display only open batches', 'Display recurring batches', and 'Include for bank deposit?'. On the right side, there are buttons for 'OK', 'Cancel', 'Options', 'Find Now', 'New Search', 'Previous Search', and 'Expand Results'.

Note: To access a complete list of used batch numbers, you can leave the criteria fields blank and click **Find Now**.

5. In the **Batch number** field, enter the batch number to verify and click **Find Now**. For example, to determine whether “33” has been used as a batch number, enter “33” in the **Batch number** field and click **Find Now**. If you cannot locate a batch associated with this number, the batch number has not been used before and you can use it for the new batch you create.

- After you verify whether the batch number has been used, click **OK** to return to the Batch Header tab of the Time Sheet Batch Setup screen.

Batch Description and Access

Note: In the **Description** box, you can enter up to 255 characters to describe the contents of the batch.

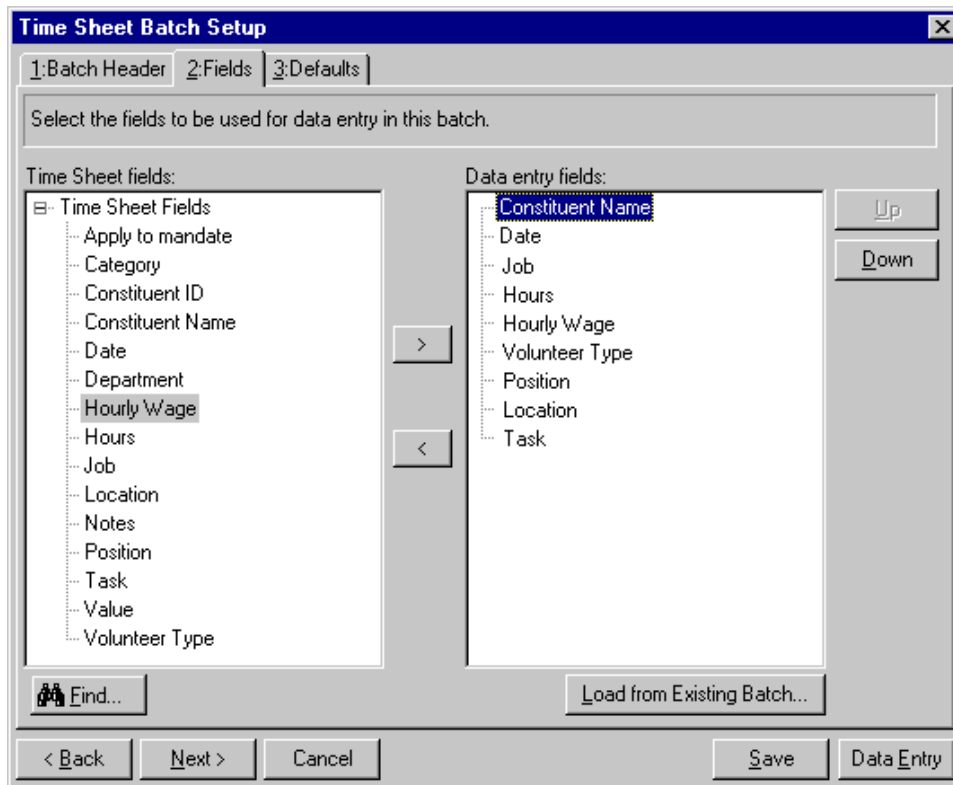
A batch description explains why you add time sheets in your database. For example, you can enter the description “Time sheet for constituents who worked in Lawn Care on 08/03/2005.” This description appears on the Open screen so you can determine the purpose for the batch before you open it. We recommend you add a description so you can quickly find a particular batch.

When you create a batch, you can mark **Other users may access this batch** to enable others to use and enter information into the batch.

Fields Tab

Note: You can use shortcut keys to move around *The Raiser’s Edge* without the use of your mouse. For example, press **ALT + 2** on your keyboard to select the Fields tab, or **ALT + 3** to select the Defaults tab.

On the Fields tab, you can select the fields to appear on the Data Entry screen for the time sheet batch. For example, if you create a time sheet batch to enter hours constituents worked in lawn care last Saturday, you can use the Fields tab to select the appropriate fields for which you want to add information.

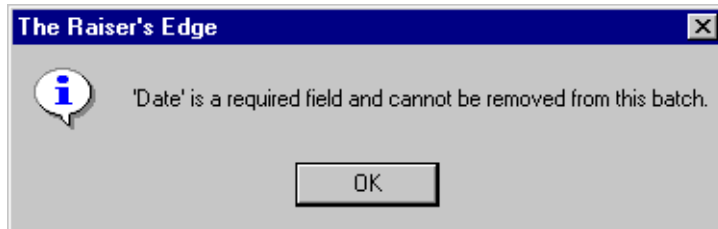


The **Time Sheet fields** box displays a list of all fields available to include in a time sheet batch. When a + symbol appears next to an entry in the **Time Sheet fields** box, click the + symbol to view a list of field names grouped under the heading. The **Data entry fields** box displays all fields you selected to appear on the Data Entry screen for the time sheet batch.

Required Fields for Time Sheet Batches

The **Constituent Name** and **Date** fields automatically appear in the **Data entry fields** box because these fields are required for all time sheet batches. The **Job** and **Hours** fields automatically appear because they are frequently used. Also, the program automatically includes any fields made required with the **Fields** link in *Configuration*. For example, if you make **Location** a required field, you must include the **Location** field in all time sheet batches. For more information about how to designate required fields, see the *Configuration & Security Guide*.

If you attempt to remove a required field, such as **Date**, from the **Data entry fields** box, you receive a message that indicates you cannot remove a required field from the batch.



When you select certain fields for a batch, other fields automatically appear in the **Data entry fields** box. For example, when you select the **Value** field, the **Hourly Wage** field automatically appears in the **Data entry fields** box.

Selecting Fields for a Time Sheet Batch

To include a field in a time sheet batch, select the field in the **Time Sheet fields** box and click the right arrow to move the field to the **Data entry fields** box. For example, if you want to include the **Location** field, select **Location** in the **Time Sheet fields** box and click the right arrow to move it to the **Data entry fields** box. The order you list the fields in the **Data entry fields** box is the order the fields appear on the Data Entry screen. To change the order of the fields, select a field in the **Data entry fields** box and click the **Up** or **Down** button to move the field to the appropriate location.

Tip: To quickly locate fields in the **Time Sheet fields** box, you can use the **Find** button.

You cannot include any time sheet fields in the **Data entry fields** box more than once. For example, if you include the **Position** field in the batch, then attempt to include the **Position** field again, you receive a message that indicates the field is already included in the batch.

Creating a Batch Template by Loading Fields from an Existing Batch

After you select the **Data entry fields** for a batch and save the batch, you can copy the field list to use as a template when you create a new batch. When you copy a field list to a new batch, you basically use a template of fields to create your new batch. In your new batch, you can also add additional fields and remove unnecessary fields as needed. To copy a field list from another batch, click **Load from Existing Batch** on the Fields tab of the Gift Batch Setup screen. This feature saves you time because you do not need to re-create a field list you already used in another batch. You basically create a template for your new batch based on an existing batch. When you load fields from another batch, the program replaces any fields in the **Data entry fields** box with the fields selected in the existing batch. When you click this button, the Open screen for batches appears so you can search for the existing batch from which you want to copy fields.

► **Creating a Batch Template by Loading fields from an existing batch**

When you load fields from another batch, the program replaces any fields in the **Data entry fields** box with the fields from the selected batch.

Note: To access the Time Sheet Batch Setup screen from the Data Entry screen, select **Tools, Edit Batch Setup** from the menu bar. To access the Time Sheet Batch Setup screen for a new batch, click **New Time Sheet Batch** on the Batch page.

1. From the Time Sheet Batch Setup screen, select the Fields tab.

The screenshot shows the 'Time Sheet Batch Setup' dialog box with the 'Fields' tab selected. The dialog has three tabs: '1:Batch Header', '2:Fields', and '3:Defaults'. Below the tabs is a text box that says 'Select the fields to be used for data entry in this batch.' The main area is divided into two columns: 'Time Sheet fields:' on the left and 'Data entry fields:' on the right. The 'Time Sheet fields:' list includes: Time Sheet Fields, Apply to mandate, Category, Constituent ID, Constituent Name, Date, Department, Hourly Wage, Hours, Job, Location, Notes, Position, Task, Value, and Volunteer Type. The 'Data entry fields:' list includes: Constituent Name, Date, Job, and Hours. There are 'Up' and 'Down' buttons next to the 'Data entry fields:' list. Between the two lists are '>' and '<' buttons. At the bottom left is a 'Find...' button with a magnifying glass icon. At the bottom right is a 'Load from Existing Batch...' button. The bottom of the dialog has a row of buttons: '< Back', 'Next >', 'Cancel', 'Save', and 'Data Entry'.

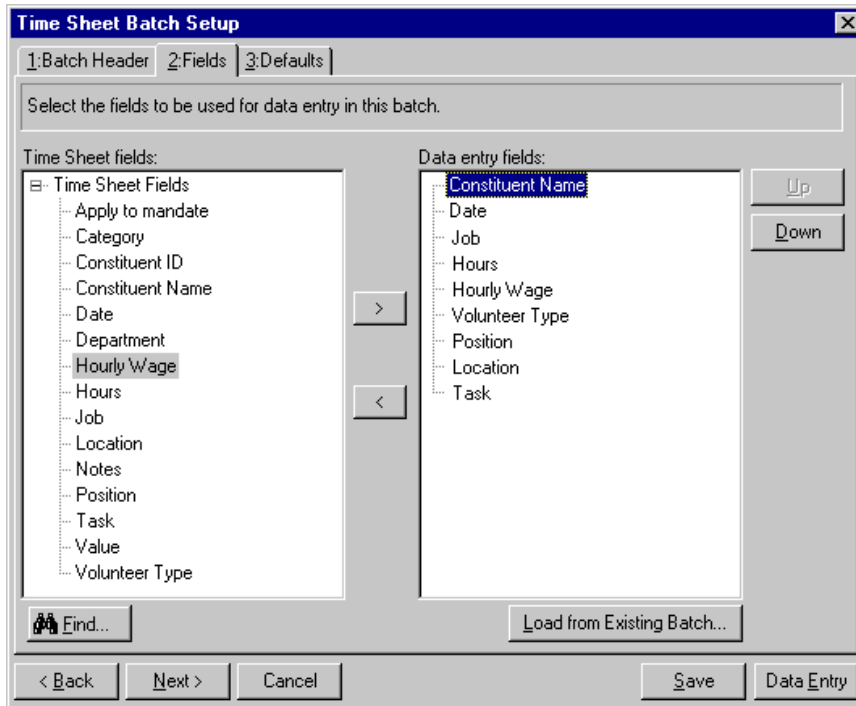
2. Click **Load from Existing Batch**. The Open screen appears so you can search for the batch to use for creating your new batch template.

The screenshot shows a software window titled "Open". At the top, there is a "Find:" label followed by a text box containing the word "Batch". Below this is a table with the following columns: "Batch Number", "Batch Description", "Batch Type", "Date Added", and "Ad". The first row of the table contains the values "36", "Timesheet", "08/12/2005", and "Supervisor". To the right of the table are buttons labeled "Open" and "Cancel". Below the table is a large empty rectangular area. At the bottom of the window, there is a section titled "Find Batches that meet these criteria:". This section contains several input fields: "Batch number:" with a dropdown menu showing "36", "Batch description:" with an empty dropdown, "Batch type:" with a dropdown menu showing "Timesheet", "Created on:" with a date picker, "Created by:" with a dropdown, and "Last committed on:" with a date picker. There are also four checkboxes: "Exact match only", "Display only open batches", "Display recurring batches", and "Include for bank deposit?". To the right of these fields are buttons labeled "Find Now", "New Search", "Previous Search", and "Expand Results".

Note: If you do not know the correct spelling or number, in the **Find Batches that meet these criteria** frame, you can enter the first few letters or characters in the criteria field. For detailed information about how to use these fields, see the *Program Basics Guide*.

3. On the Open screen for batches, enter information in the criteria fields at the bottom of the screen to help you narrow the search and click **Find Now**.
4. When you locate the batch from which to create a template, select the batch in the grid.

5. Click **Open**. You return to the Fields tab of the Time Sheet Batch Setup screen. The program copies the field list from the batch you select to the **Data entry fields** box, and therefore provides a template to work with so you do not have to remember which fields to add when you work with new batches.



Warning: We recommend you search by one or two of the most helpful criteria types, because the results that appear in the grid must match all the criteria you enter. If you add too much criteria information in the **Find Batches that meet these criteria** fields, it can prevent you from finding the time sheet.

6. You can add or remove fields from the **Data entry fields** box, as necessary.
7. To begin to add time sheets to the batch, click **Data Entry**. For more information about the Data Entry screen, see "Time Sheet Batch Data Entry" on page 254.

Defaults Tab

Defaults are guidelines you can set up to simplify data entry. For example, if you add time sheets to a batch that have the Decorations job, you can set the default for the **Job** field to Decorations. Each time you add a new time sheet to the batch, the program enters Decorations in the **Job** field. This saves you time because you do not have to select an entry for the **Job** field for each time sheet you add to the batch. After the program enters a default in a field, you can select the text and type over it with the correct entry to change the default entry. If you decide to add a time sheet with a different job while you add time sheets to the batch, you can change the default entry of Decorations to a different job.

On the Defaults tab, you can select a default for many of the fields you include in your batch. If you do not want to specify a default value, you can leave any or all fields on this tab blank.

Time Sheet Batch Setup

1:Batch Header | 2:Fields | 3:Defaults

You can enter a value in any of the fields below to create a default value for that field.

General

Field	Default Value	Hide?
Constituent name		<input type="checkbox"/>
Date		<input type="checkbox"/>
Constituent ID		<input type="checkbox"/>
Job	Decorations	<input checked="" type="checkbox"/>
Position	Design decorator	<input type="checkbox"/>
Hours		<input type="checkbox"/>
Hourly Wage		<input type="checkbox"/>
Volunteer Type		<input type="checkbox"/>

< Back | Next > | Cancel | Save | Data Entry

Adding a Default

The Defaults grid displays the fields you selected on the Fields tab of the Time Sheet Batch Setup screen. To add a default, enter the field entry in the **Default Value** column as you normally would on a constituent record.

The order the fields appear on this screen is the order they appear on the Data Entry screen. To change the order, select the field to move and click the **Up** or **Down** button to relocate the field. When you change the field order in the Defaults grid, the order updates in the **Data entry fields** box on the Fields tab.

Hiding a Field

To add information for a field on a time sheet, you must include the field in the batch. If you enter the same information in a particular field for each time sheet in a batch, you may want to add a default and hide the field to reduce the number of fields that appear in the Data Entry grid. For example, your organization hosts an Open House and, in a batch, you want to enter job information for constituents who helped decorate. You can enter Decorations as a default for the **Job** field and hide this field because this job is the same for all time sheets entered in this batch.

To hide a field, mark **Hide?** on the Defaults tab of the Time Sheet Batch Setup screen. From the Data Entry screen, to display the hidden columns, select **View, Hide/Show Columns** from the menu bar. For more information about how to display hidden columns, see “Hiding Columns and Viewing Hidden Columns in a Batch” on page 278.

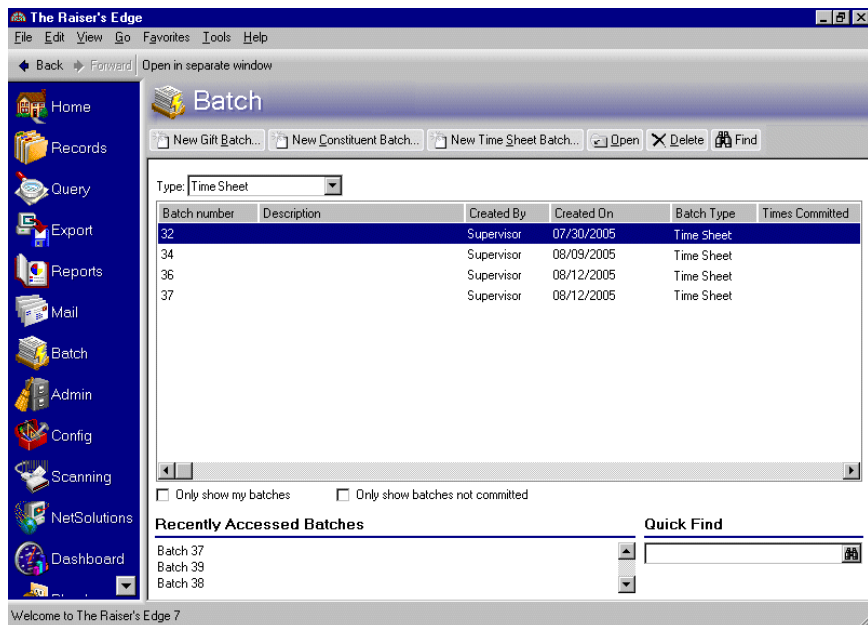
Setting Up a New Time Sheet Batch

Now that you understand the features and options on the Time Sheet Batch Setup screen, you can set up a batch to add new time sheets to your database.

► **Setting up a new time sheet batch**

Scenario: On 08/05/2006, your organization held its Annual Walk to raise money for Skin Cancer Awareness. To prepare for the event, volunteers for your organization worked with decorations and flyers. You now want to set up a time sheet batch to add a time sheet for each of these volunteers. Create a new time sheet batch and include the **Constituent ID, Category, Position, Department, and Location** fields.

1. On the Raiser's Edge bar, click **Batch**. The Batch page appears.



Warning: If you do not have security rights to create a time sheet batch, the **New Time Sheet Batch** link is disabled.

- Click **New Time Sheet Batch** at the top of the page. The Time Sheet Batch Setup screen appears.

Time Sheet Batch Setup

1: Batch Header | 2: Fields | 3: Defaults

Batch Statistics			
Number of time sheets:	0	Last committed on:	
Created on:	08/13/2005 11:32:34...	Created by:	Supervisor
Last changed on:			

Batch number: 40

Description: Volunteers who worked with decorations for the Annual Walk 08/05/2005

☒ Other users may access this batch

Press F7 to zoom

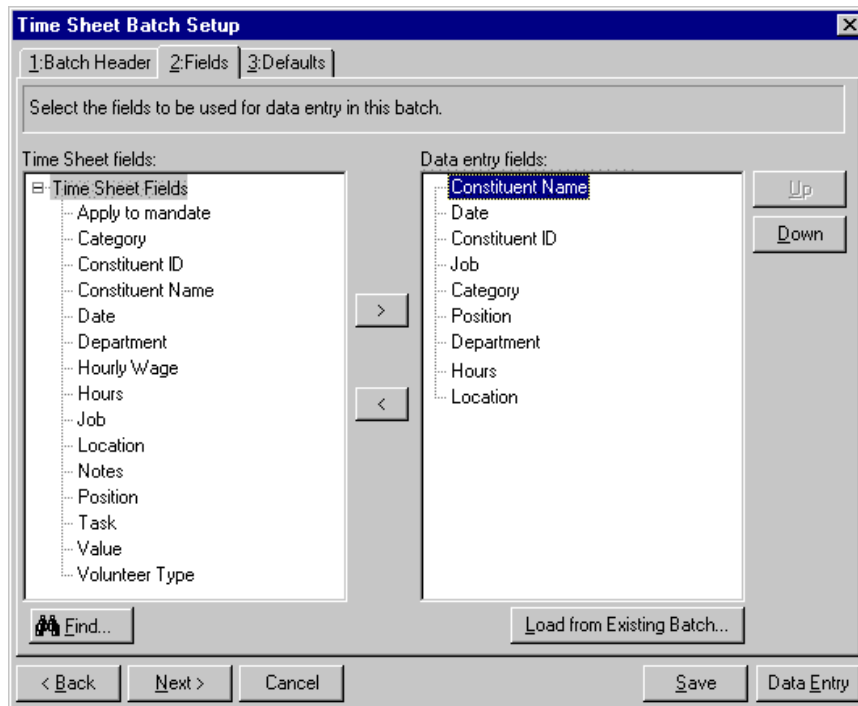
< Back Next > Cancel Save Data Entry

- In the **Batch number** field, the program defaults the next available batch number. For this example, it is not necessary to change the default batch number.

Note: The program formats the batch number according to settings you select on the Business Rules page in *Configuration*. For more information about how to define the format for batch numbers, see “Business Rules” on page 237.

- In the **Description** field, enter “Volunteers who worked with decorations for the Annual Walk 08/05/2005”. The description explains why you add time sheets to this batch.
- Mark **Other users may access this batch**. This batch does not contain sensitive information so it is not necessary to limit access to the user who creates the batch.

6. At the bottom of the Time Sheet Batch Setup screen to display the Fields tab, click **Next**. The **Constituent Name**, **Date**, **Job**, and **Hours** fields automatically appear in the **Data entry fields** box because they are required fields for constituent batches.



7. In the **Time Sheet fields** box, click the plus sign next to **Time Sheet Fields** to view all the fields in this category.
8. Select the **Constituent ID** field in the **Time Sheet fields** box and click the right arrow to move this field to the **Data entry fields** box. The program moves the fields to the bottom of the list in the **Data entry fields** box.
9. Use the same selection method to include the following fields in this time sheet batch: **Category**, **Position**, **Department**, and **Location**.

You can use the **Up** and **Down** buttons to position the fields in the order you want them to appear.

Note: You can use shortcut keys to move around *The Raiser's Edge* without the use of your mouse. For example, press **ALT + 3** on your keyboard to select the Defaults tab.

10. At the bottom of the screen to display the Defaults tab, click **Next**. The Defaults grid displays all the fields you selected on the Fields tab.

Time Sheet Batch Setup

1: Batch Header | 2: Fields | 3: Defaults

You can enter a value in any of the fields below to create a default value for that field.

General

Field	Default Value	Hide?
Constituent name		<input type="checkbox"/>
Date	08/05/2005	<input type="checkbox"/>
Constituent ID		<input type="checkbox"/>
Job	Decorations	<input type="checkbox"/>
Category	Day of Walk	<input type="checkbox"/>
Position	Design decorator	<input type="checkbox"/>
Department		<input type="checkbox"/>
Hours		<input type="checkbox"/>
Location		<input type="checkbox"/>

Up Down

< Back Next > Cancel Save Data Entry

11. In the **Default Value** column, enter the date 08/05/2005 as the default for the **Date** field. All of the volunteers worked on this date.
12. In the **Default Value** column, select “Decorations” as the default for the **Job** field because all the constituents you enter for the time sheet worked with decorations for the event. “Day of Walk” defaults into the **Category** field, and the position title “Design decorator” defaults into the **Position** field. These defaults are pulled in from the Decorations job record. For more information about job records, see the *Volunteers & Jobs Data Entry Guide*.

Warning: Only hide a field if you enter a default, and you do not expect the value of this default to change for any time sheet entered in the batch.

13. To hide a column in the batch, in the **Hide?** column, mark the checkbox in the field to hide. When you hide a field, the program does not display the field on the Data Entry screen for the batch. For this example, you do not need to hide any fields.
14. To save the information entered on the Time Sheet Batch Setup screen and display the Data Entry screen for this time sheet batch, click **Data Entry**. For more information about how to add time sheets to the batch, see “Adding Time Sheets in the Data Entry Grid” on page 262.

Time Sheet Batch Data Entry

After you select the fields and defaults for the batch on the Time Sheet Batch Setup screen, click **Data Entry** to display the Data Entry screen for the time sheet batch.

Constituent Name	Date	Constituent ID	Job	Position	Hours	Location	Volunteer Ty
*	08/13/2005		Decorations	Design decorator			
Max Taylor	08/13/2005	77	Decorations	Design decorator	5.00	1428 Virginia Ave...	Coordinator

There are three main areas on the Data Entry screen: the Default Row, the Data Entry grid, and the Status bar.

Default Row

Note: To easily differentiate the Default Row from the other rows in the Data Entry grid, we strongly recommend you display the Default Row in a different color than the Data Entry grid.

When displayed, the Default Row is the first row in the Data Entry grid and contains the default values you select on the Defaults tab of the Time Sheet Batch Setup screen. When you add time sheets to the batch, any information entered in the Default Row appears as a default for each new time sheet in the batch. In User Options, you can display or hide the Default Row, choose a color in which to display this row, and select how to add the defaults for each time sheet.

Before you begin to enter data in a time sheet batch, you must select in User Options how to enter defaults in the batch. There are three ways to enter defaults in the batch. You can press **F2** when in a field to add the default for that field, insert a default when you select a field, or insert all available defaults when you begin a new row in the batch. The Default Row is a tool to easily see and change the current defaults for a batch.

To change the defaults when you display the Default Row, type over the default to change in the Default Row. When you change values in the Default Row, the changes update on the Defaults tab of the Time Sheet Batch Setup screen. If you change an entry in the Default Row after you enter time sheets in the batch, the new default settings affect the time sheets entered after you make the change. The new default settings do not affect time sheets already entered in the batch. For more information about how to display the default row, see “User Options” on page 232.

Data Entry Grid

In the Data Entry grid, each row in the spreadsheet that contains information becomes a time sheet record when you commit a batch to the database. Time sheets are stored on the Volunteer tab of a volunteer's constituent record.

Constituent Name	Date	Constituent ID	Job	Position	Hours	Location	Volunteer Ty
* Max Taylor	08/13/2005	77	Decorations	Design decorator	5.00	1428 Virginia Ave...	Coordinator

When you set up a time sheet batch, you define the columns that appear in the Data Entry screen from the Fields tab of the Time Sheet Batch Setup screen. The columns list in the order you select on the Fields tab. For more information about the Fields tab, see “Fields Tab” on page 244.

Constituent Window

Note: To easily move back and forth between the Data Entry grid and the Constituent Window, press **F8** on your keyboard.

When you add time sheets in a batch, you may discover a volunteer who is not a constituent in your database. You can use the Constituent Window to create a new constituent record for the volunteer or edit information on a volunteer's existing constituent record. When you display the Constituent Window, the program displays information about the constituent for whom you add a time sheet.

The screenshot shows a software window titled "Batch 37" with a menu bar (File, Edit, View, Time Sheet, Constituent, Favorites, Tools, Help) and a toolbar. Below the toolbar is a table with columns: Constituent Name, Date, Constituent ID, Department, and H. The table lists four constituents: Taylor, Max; Nodason, Marlena; Garrity, Katherine; and Frantz, Paul. The "Taylor, Max" row is selected. To the right of the table is a "Field" and "Value" section showing details for the selected constituent: Title 1 (Mr.), First Name (Max), Last Name (Taylor), ID (77), Address Address Lines (3327 Dawso...), Address City (Pittsburgh), Address State (PA), Address ZIP (15208), Address Phone type1 (Home), Address Phone num... (403-555-4579), Constituent Code Co... (Grandparent), Primary Addressee, and Primary Salutation. At the bottom, a status bar shows "Ready." and "Time sheet 4 of 4".

Constituent Name	Date	Constituent ID	Department	H
Taylor, Max	8/23/2005	77	Education	
Nodason, Marlena	8/23/2005	54	Education	
Garrity, Katherine	8/23/2005	179	Sporting Events	
Frantz, Paul	8/23/2005	23	Community Service	

Field	Value
Title 1	Mr.
First Name	Max
Last Name	Taylor
ID	77
Address Address Lines	3327 Dawso...
Address City	Pittsburgh
Address State	PA
Address ZIP	15208
Address Phone type1	Home
Address Phone num...	403-555-4579
Constituent Code Co...	Grandparent
Primary Addressee	
Primary Salutation	

Tip: You can use shortcut keys to move around *The Raiser's Edge* without the use of your mouse. For example, to access the spouse details screen for a constituent, with your cursor in the **Sp. Name** field in the constituent window, press **F6** on your keyboard.

Just like you selected the fields to appear in the time sheet batch, you need to select the constituent fields to appear in the Constituent Window. Required fields are automatically selected, such as **Constituent Name**, to appear in the Constituent Window, in addition to the fields you designate as required with the **Fields** option in *Configuration*. For more information about how to designate a field as required, see the *Configuration & Security Guide*.

► Viewing the Constituent Window

1. From the Data Entry screen of a time sheet batch, select **View, Constituent Window** from the menu bar. For more information about how to open a time sheet batch, see "Accessing a Time Sheet Batch" on page 229.

- The Constituent Window appears on the right side of the screen. To resize the Constituent Window, click and drag the divider that exists between the Constituent Window and the Data Entry screen.

The screenshot shows the 'Batch 37' window with a menu bar (File, Edit, View, Time Sheet, Constituent, Favorites, Tools, Help) and a toolbar. Below the toolbar is a table of constituents:

Constituent Name	Date	Constituent ID	Department
Taylor, Max	8/23/2005	77	Education
Nodason, Marlana	8/23/2005	54	Education
Garrity, Katherine	8/23/2005	179	Sporting Events
Frantz, Paul	8/23/2005	23	Community Service

To the right of this table is a 'Field' and 'Value' section for the selected constituent (Max Taylor):

Field	Value
Title 1	Mr.
First Name	Max
Last Name	Taylor
ID	77
Address Address Lines	3327 Dawso...
Address City	Pittsburgh
Address State	PA
Address ZIP	15208
Address Phone type1	Home
Address Phone num...	403-555-4579
Constituent Code Co...	Grandparent
Primary Addressee	
Primary Salutation	

The status bar at the bottom indicates 'Ready.' and 'Time sheet 4 of 4'.

- To hide the Constituent Window, select **View, Constituent Window** again from the menu bar.

► Selecting the fields to appear in the Constituent Window

Note: Many of the fields and options on the Define Constituent Fields screen work the same as the fields and options on the Fields tab of the Time Sheet Batch Setup screen. For more information about the Time Sheet Batch Setup screen, see "Time Sheet Batch Setup" on page 240.

- From the Data Entry screen of a time sheet batch, select **Constituent, Define Constituent Fields** from the menu bar. The Define Constituent Fields screen appears. For more information about how to open a time sheet batch, see "Accessing a Time Sheet Batch" on page 229.

The 'Define Constituent Fields' dialog box is shown. It has a title bar and a close button. The main text says: 'Select the Constituent fields to be used for data entry. Fields and defaults can be selected for both individual and organization records.'

Below this, there are two radio buttons: 'Define fields for: ☒ Individuals ☐ Organizations'.

There are two main sections:

- Available Fields:** A list box containing various fields such as 'Address Region', 'Address Seasonal from', 'Address Seasonal to', 'Address Send mail to', 'Address State', 'Address Type', 'Address ZIP', 'Address Phone number', 'Address Phone type', 'Address Attributes', and 'Attributes'. The 'Address Phone number' field is currently selected.
- Data Entry Fields:** A table with two columns: 'Field Name' and 'Default Value'. It lists the fields currently selected for data entry:

Field Name	Default Value
ID	
Address Address Lines	
Address City	
Address State	
Address ZIP	
Address Phone type1	Home
Address Phone number1	
Constituent Code Code1	

At the bottom, there are buttons for 'Find...', 'Select>', 'Remove', 'OK', and 'Cancel'.

2. In the **Define fields for** field, to define the fields that display in the Constituent Window for individual constituent records, select **Individuals**.
3. In the **Available fields** box, select a field to display in the Constituent Window. For example, select the **Address Phone number** field.

Note: The order you list the fields in the **Data entry fields** grid is the order the fields appear in the Constituent Window. To rearrange the fields, highlight a field in the **Data entry fields** grid and click the up or down arrow to move the field to the appropriate place.

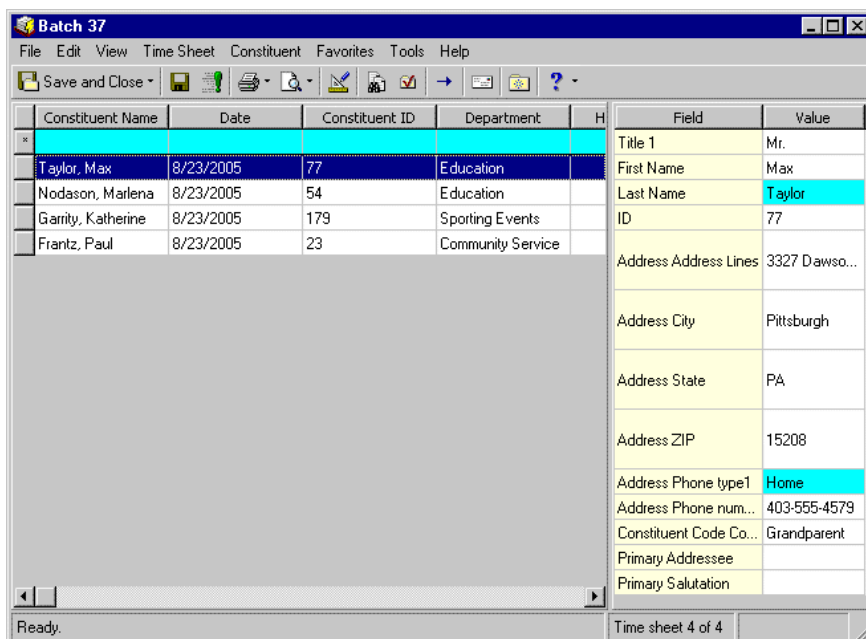
4. To include the field in the Constituent Window, click **Select**. The **Address Phone number 1** field appears at the bottom of the **Data Entry Fields** grid.
5. In the **Default Value** column of the **Data Entry Fields** grid, enter any necessary defaults for the Constituent Window. For example, if you selected to include **Address Phone type**, you can enter the default of “Home” in the **Address Phone type 1** field. These defaults appear only when you add new constituents in the batch.
6. In the **Define fields for** field, select **Organization** to define the fields that display in the Constituent Window for organization constituent records.

7. In the **Available fields** box, select a field to display in the Constituent Window. For example, highlight the **Address Phone type** field.
8. To include the field in the Constituent Window, click **Select**. The **Address Phone type 1** field appears at the bottom of the **Data Entry Fields** grid.
9. In the **Default Value** column of the **Data Entry Fields** grid, enter any necessary defaults for the Constituent Window. For example, you can enter the default of “Business” in the **Address Phone type 1** field. These defaults appear only when you add new constituents in the batch.
10. To return to the data entry screen, click **OK**.

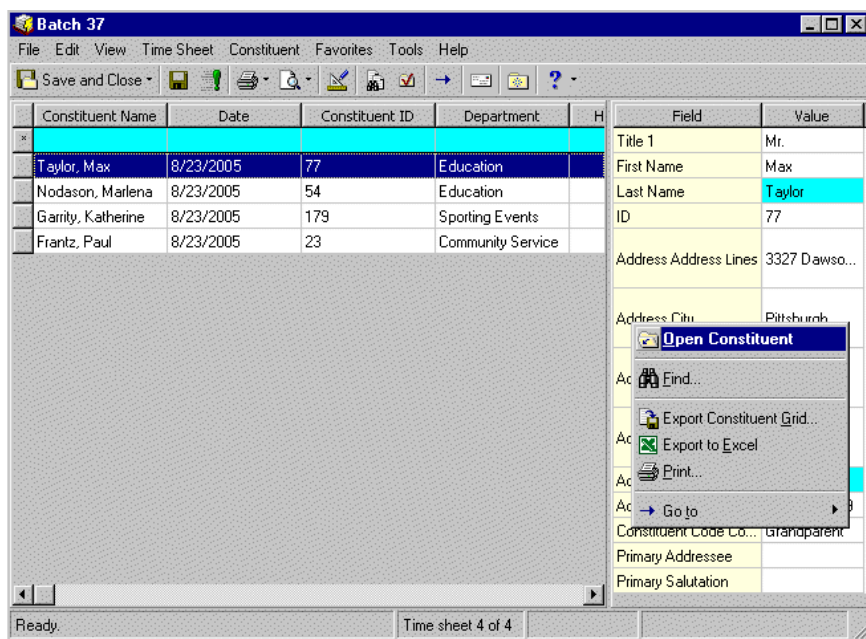
► **Accessing a volunteer's constituent record from the Constituent Window**

Some fields on the volunteer's constituent record cannot be displayed in the Constituent Window. If you need to add information about a volunteer, you can access the volunteer's constituent record from the Constituent Window.

1. From the Data Entry screen of a time sheet batch, select **View, Constituent Window** from the menu bar. For more information about how to open a time sheet batch, see "Accessing a Time Sheet Batch" on page 229.



2. Right-click in the Constituent Window. A shortcut menu appears.



3. Select **Open Constituent**. The constituent record appears.

Max G. Taylor

File Edit View Constituent Letter Favorites Tools Help

Save and Close

Attributes Media Actions Honor/Memorial Volunteer Prospect Membership Events
 Bio 1 Bio 2 Addresses Addressees/Salutations Relationships Appeals Notes Gifts

Biographical

Last name: Taylor Aliases
 First name: Max
 Middle name: Gerome
 Titles: Mr.
 Suffixes:
 Nickname:
 Maiden name:
 ID: 77
 Gender: Male SSN: 229-13-4356
 Birth date: 07/05/1940 Age: 65
☐ Deceased? Date:
 Marital status: Married
 Spouse: Michelle Taylor
 Solicit code:

Preferred Address : Home

Country: United States
 Address lines: 3327 Dawson Street
 City: Pittsburgh
 State: PA Pennsylvania
 ZIP: 15208 DPC:

Phones/Email/Links

DNC	Type	Number/Email Address	Shared?
	Home	403-555-4579	Shared

This constituent

☐ Is inactive ☒ Is a solicitor ☒ Details
☐ Gives anonymously ☐ Has no valid addresses
☐ Requests no email

Grandparent (04/04/2001 -); Alumnus (06/01/1962 -)

Education Business Bank

4. To save your changes and return to the Data Entry screen, click **Save and Close** on the toolbar.

► Adding a new constituent using the Constituent Window

You can add new constituents through the Constituent Window of the screen. For example, while you add time sheets to a batch, you notice a volunteer who helped decorate for the Annual Walk and currently is not a constituent in your database. From the constituent window, you can search for an existing record for that volunteer. If no record exists, you can add the new constituent to your database.

1. From the Data Entry screen of a time sheet batch, select **View, Constituent Window** from the menu bar. For more information about how to open a time sheet batch, see “Accessing a Time Sheet Batch” on page 229.
2. In the **Constituent Name** column of a new row in the time sheet batch, enter the name of the new constituent.

3. Press **TAB** on your keyboard. The Open screen for constituents appears. The new constituent's name appears in the **Last/Org name** and **First name** fields.

Open

Find: Constituent Search using query: <Default>

Open Cancel

Add New Options

Find Now New Search Previous Search

Expand Results

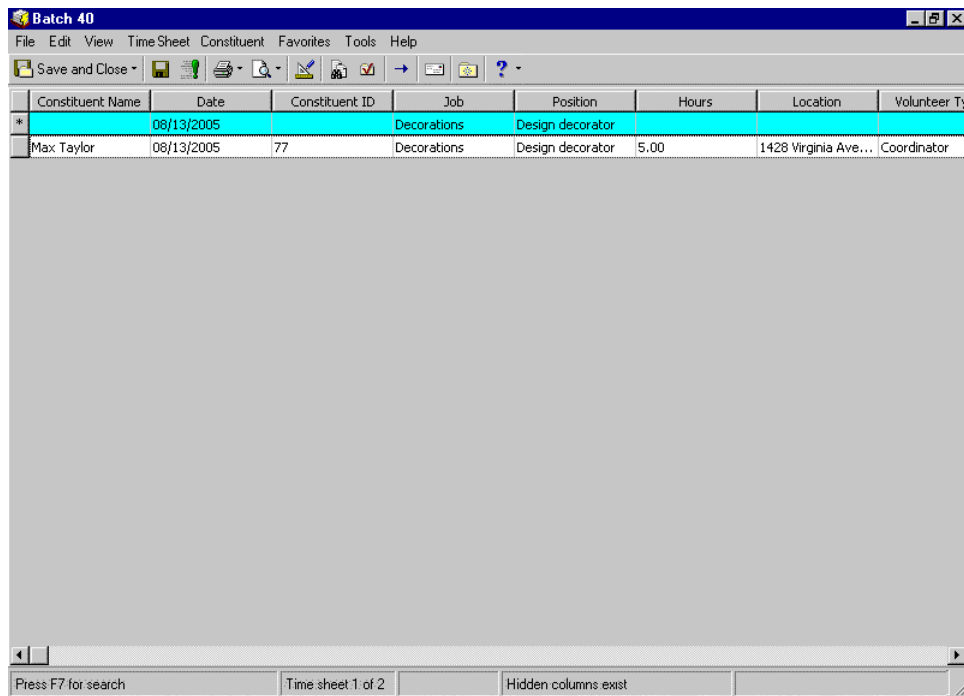
Find Constituents that meet these criteria:

Last/Org name: Address lines: City: State: ZIP: Class of: Credit card no.:
First Name: Constituent ID: SSN: Membership ID: Bank acct. no.:
Check spouse name: Check aliases: Exact match only: Check contact name: Check nickname: Display inactive constituents: Display deceased constituents:

4. To verify the new constituent does not have a record in the database, click **Find Now**.
5. If you cannot locate the constituent in the database, click **Add New**. From the submenu that appears, select whether to add an individual or organization record. For more information about how to add constituent records, see the *Constituent Data Entry Guide*.
6. The volunteer now has a constituent record in the database. You can use the Constituent Window to add information to the constituent record, or you can access the constituent record to add complete information. For more information, see "Accessing a volunteer's constituent record from the Constituent Window" on page 259.

Status Bar

The status bar at the bottom of the Data Entry screen displays helpful information about the time sheets entered in the batch. It is divided into three sections.



The first section of the status bar displays messages related to data entry. For example, when you have focus in the **Constituent Name** field, this section of the status bar displays “Press F7 for search”.

The second section of the status bar displays the row number for the active row versus the total number of time sheets in the batch. For example, if you enter 40 time sheets in a batch and you select the row for the tenth time sheet listed in the batch, the program displays “Time sheet 10 of 40” in this section of the status bar. The total number of time sheets in the batch updates every time you complete the entry for a time sheet.

When you hide one or more columns in the Data Entry grid, the last section of the status bar displays the message “Hidden columns exist”. You can hide columns on the Defaults tab of the Time Sheet Batch Setup screen or by selecting **View, Hide/Show Columns** from the menu bar. For more information, see “Hiding Columns and Viewing Hidden Columns in a Batch” on page 278. If you do not hide any columns in the batch, the program does not display a message in this section of the status bar.

Adding Time Sheets in the Data Entry Grid

Note: You can run a Validation Report that lists time sheet information included in your time sheet batch. For more information about this report and other time sheet batch reports, see “Batch Reports” on page 291.

After you set up a batch, you can begin to add time sheets in the Data Entry grid. There is no limit to the number of time sheets you can enter in a batch. However, we recommend you commit the batch at a regular interval.

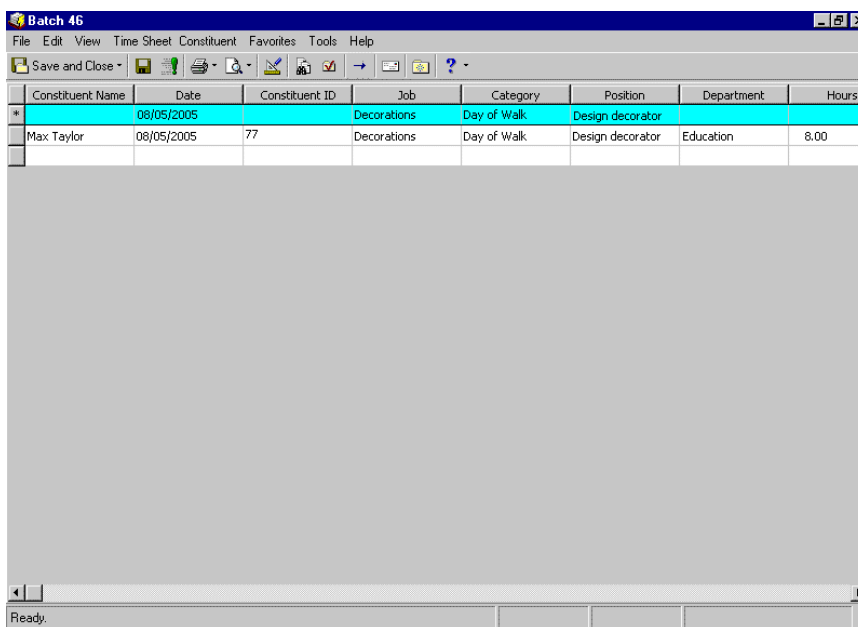
► Adding time sheets to the Data Entry grid

Scenario: You are ready to add time sheet information for volunteers who helped decorate and pass out flyers for your organization's Annual Walk for Skin Cancer Awareness on 08/05/2005. Set up a batch to add the time sheets to your database. The first time sheet you want to add is for Max Taylor. Max worked as the Coordinator for the decorations and worked 8 hours at the main office on 08/05/2005.

Scenario: Before you can add new time sheets to a batch, you must set up the batch. To set up the batch, select the batch number and the fields and defaults you want to include in the batch. This scenario uses the batch set up in "Setting up a new time sheet batch" on page 250.

Note: The first row of the batch may display the Default Row. When you add time sheets to a batch, make sure you add the time sheet information in the rows below the Default Row. For more information, see "Default Row" on page 254.

1. From the Batch page, open the time sheet batch with the description "Volunteers who worked with decorations for the Annual Walk 08/05/2005". For more information about how to open a time sheet batch, see "Accessing a Time Sheet Batch" on page 229. The Data Entry screen appears for the time sheet batch.



Constituent Name	Date	Constituent ID	Job	Category	Position	Department	Hours
Max Taylor	08/05/2005	77	Decorations	Day of Walk	Design decorator	Education	8.00

Note: To move from field to field in the Data Entry grid, use the arrow keys in conjunction with the Control key on your keyboard. For example, <CTRL> + RIGHT ARROW KEY moves your cursor to the right.

2. Click in the first row of the **Constituent Name** field. The binoculars appear. Click the binoculars to access the Open screen for constituents and locate "Max Taylor" in your database. For more information about the Open screen for constituents, see "Constituent Batch" on page 1. After you locate Max Taylor in the database, his name appears in the first row of the **Constituent Name** field.
3. In the **Date** field, the default date you entered when you set up the batch appears. For this example, the date Max worked is 08/05/2005.
4. In the **Constituent ID** field, once you enter a constituent's name in the **Constituent Name** field, the program automatically adds the constituent's ID. For this example, Max's ID is 77.
5. In the **Job** field, "Decorations" automatically appears because earlier you specified this as the default.

6. In the **Category** field, “Day of Walk” automatically appears because earlier, you specified this as the default.

Note: It is possible to enter a time sheet and not indicate a job. You can leave the **Job** field blank and use only the fields you need.

7. In the **Position** field, “Design decorator” automatically appears because earlier you specified this as the default.
8. In the **Department** field, select “Education”. Max volunteered through the Education department of your organization.
9. In the **Hours** field, enter the number 8. Max worked 8 hours on 08/05/2005.
10. In the **Location** field, select “Main Office”. Max spent the day preparing for the Annual Walk at your organization’s main office.
11. To create a new row so you can add the next time sheet to the batch, press **TAB** on your keyboard.

Note: To display the Constituent Window, select **View, Constituent Window** from the menu bar. To define the fields in the Constituent Window, select **Constituent, Define Constituent Fields** from the menu bar.

12. With the same methods you used to add Max Taylor’s time sheet information to the batch, add additional time sheets.
 - Michelle Taylor, who worked 5 hours as a general volunteer, preparing decorations and flyers at your organization’s main office.
 - Julie Bach, who worked 2 hours as a general volunteer, returning decorations and flyers to the main office after your organization’s Annual Walk.
 - Audrey Lorenz, who worked 8 hours as a general volunteer preparing decorations and flyers at your organization’s main office.
13. To save the information you entered in the batch and close the Data Entry screen, click **Save and Close** on the toolbar.

Data Entry Screen Menu Options

This section contains basic procedures for the Data Entry screen menu, such as to add and remove fields from a time sheet batch, and hide and freeze columns in the Data Entry grid. For more information about general menu options, see the *Program Basics Guide*.

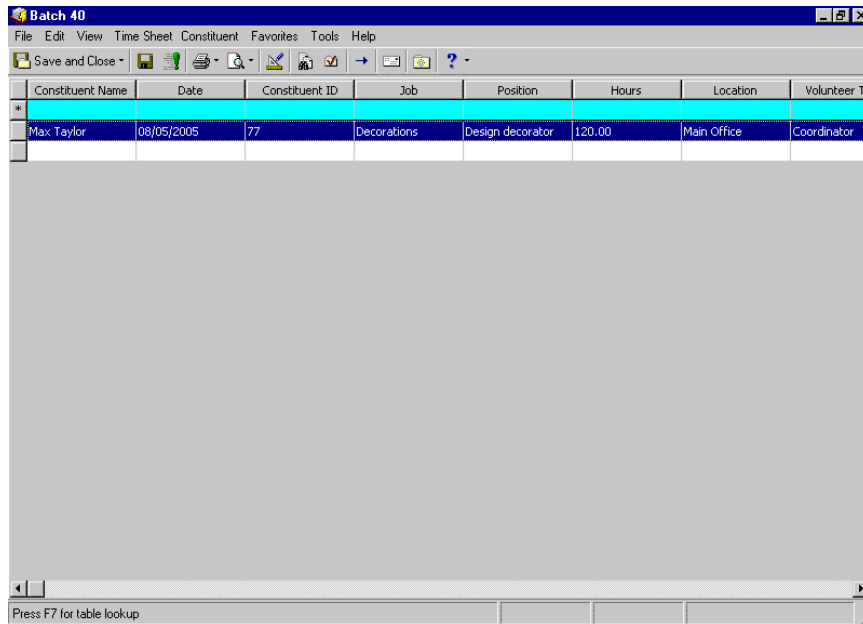
Selecting, Inserting, and Deleting Rows from the Data Entry Grid

You can use the following procedures to select, insert, and delete rows in a time sheet batch. It is useful to select rows to insert or delete rows or export data to another application. It is useful to insert rows in a time sheet batch when you enter time sheet information in the batch in a certain order. You may need to insert a row in the batch to maintain the order you use. You can also easily delete rows in a batch. For example, you may need to delete a new time sheet row because you accidentally added the time sheet in the batch twice.

► Selecting rows from the Data Entry grid of a batch

Note: To select a row, you can also click on the gray square to the left of the row.

1. From the Data Entry screen of a batch, click in the row you want to select, and select **Edit, Select Row**. The row appears selected. For more information about how to open a time sheet batch, see “Accessing a Time Sheet Batch” on page 229.

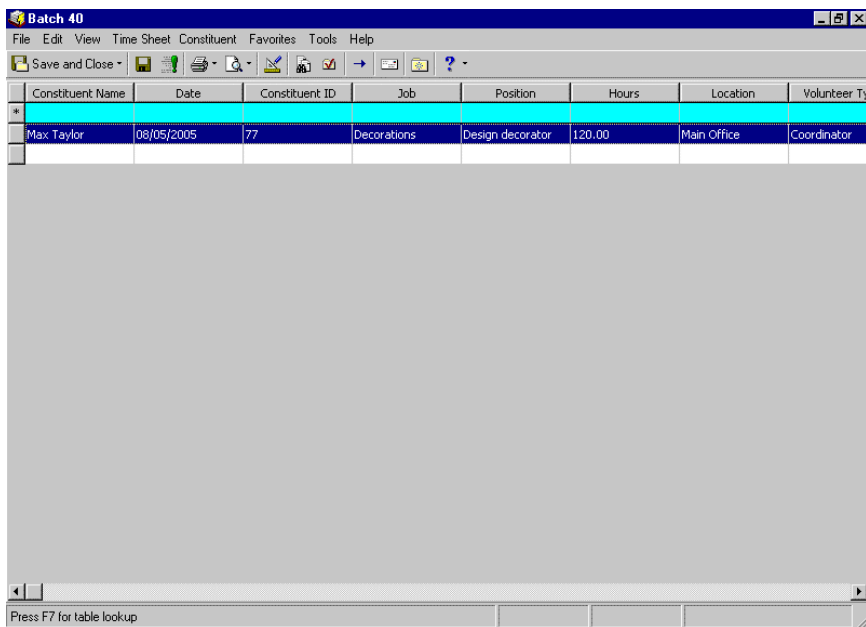


2. To deselect the highlighted row, click in any other row in the Data Entry grid.
3. With your cursor anywhere in the Data Entry grid, select **Edit, Select All Rows**. All rows now appear selected.
4. To deselect the highlighted rows, click anywhere in the Data Entry grid.

► **Inserting a row in the Data Entry grid of a batch**

Note: To insert a new row, you can also right-click the selected row to access the shortcut menu. From the shortcut menu, select **Insert Row**.

1. From the Data Entry screen for a batch, select the row below which to insert a new blank row. The blank row appears above the row where you place your cursor. For more information about how to open a time sheet batch, see “Accessing a Time Sheet Batch” on page 229.

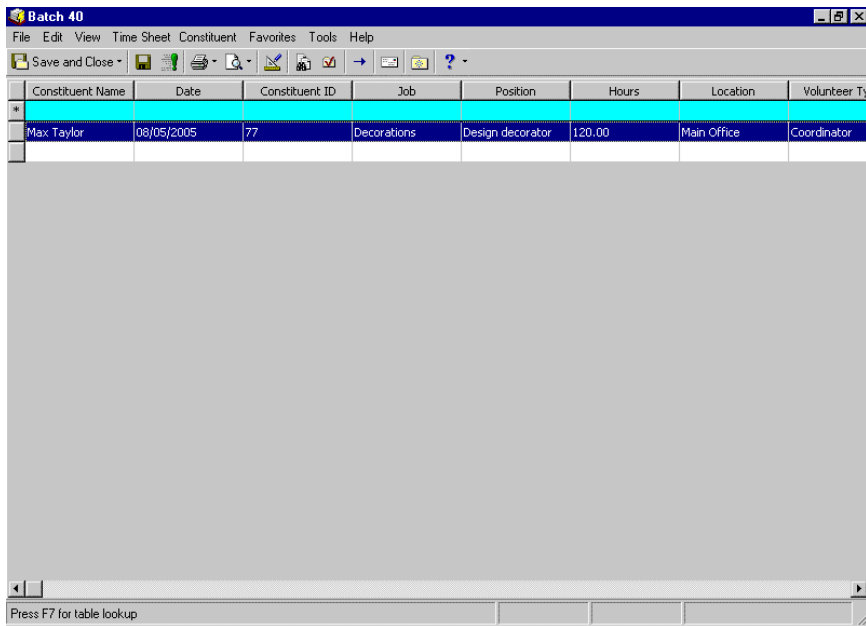


2. From the menu bar, select **Edit, Insert Row** to add a row above the selected row.

► **Deleting a row in the batch**

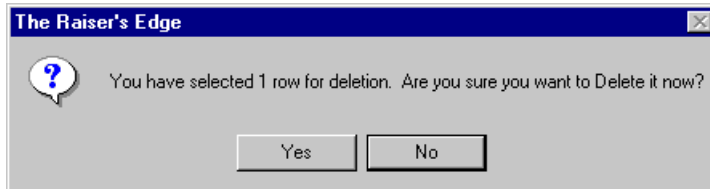
Note: To highlight a row in the Data Entry grid, click the gray square to the left of the row in the Data Entry grid.

1. From the Data Entry screen for a batch, select the row in the batch to delete. For more information about how to open a time sheet batch, see “Accessing a Time Sheet Batch” on page 229.



Note: To delete a row, you can also right-click the selected row to access the shortcut menu. From the shortcut menu, select **Delete Row**.

- From the menu bar, select **Edit, Delete Row** to delete the selected row.



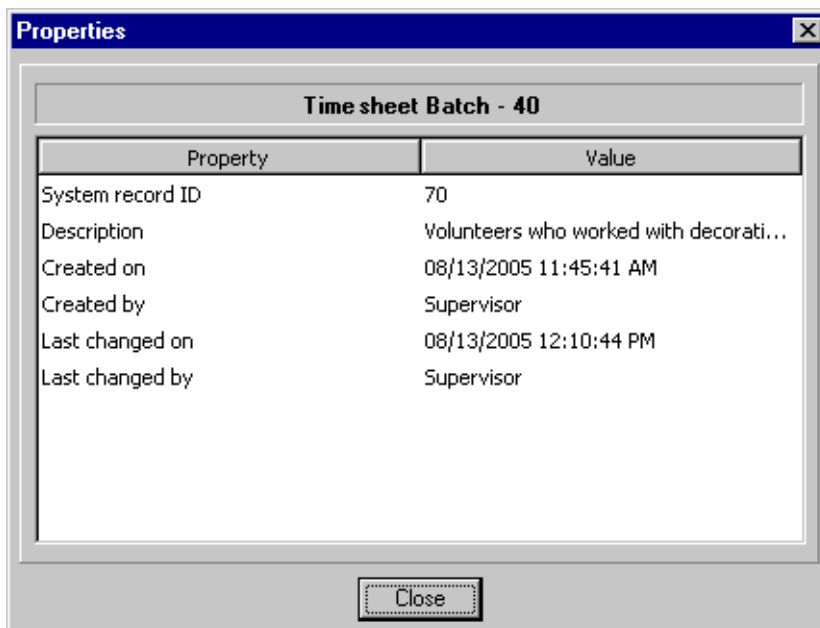
- To permanently delete the row from the Data Entry grid, click **Yes**.

Viewing Properties for a Time Sheet Batch

You can easily view the properties for a time sheet batch. The Properties screen gives you detailed information about a time sheet batch, such as when the batch was created, the system record identification, and who created the batch.

▶ Viewing properties for a time sheet batch

- From the Data Entry screen of a time sheet batch, select **File, Properties** from the menu bar. The Properties screen appears. For more information about how to open a time sheet batch, see “Accessing a Time Sheet Batch” on page 229.



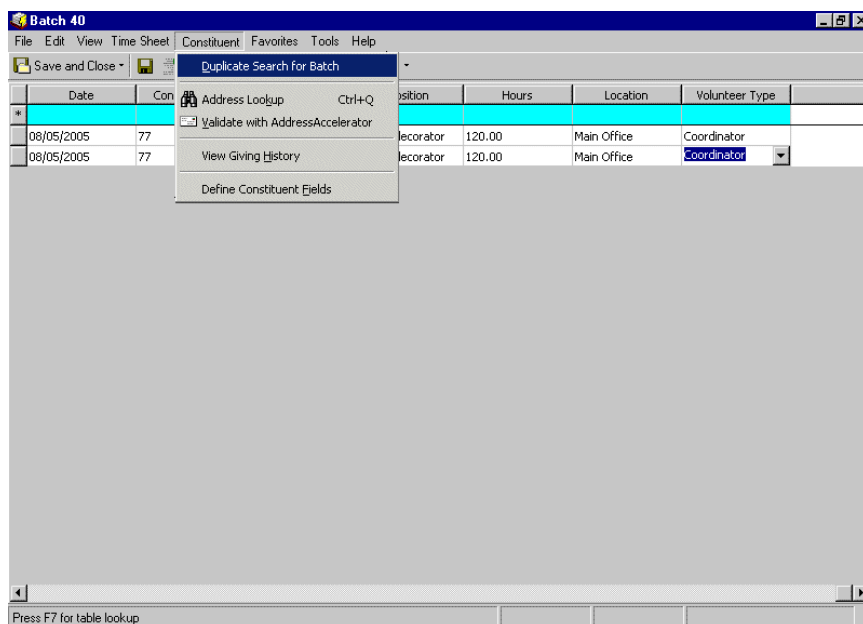
- When you finish viewing the Properties screen, click **Close**. You return to the Data Entry screen of the time sheet batch.

Adding and Removing Fields from a Time Sheet Batch

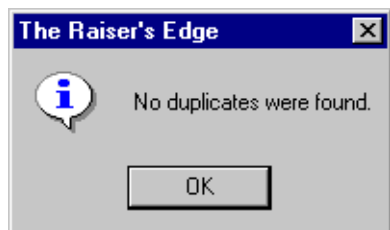
You can add and remove fields from a time sheet batch after you begin to enter time sheet data. When you remove fields that contain data, the data is not retained. If you add the field again, you need to reenter the data. For example, if you remove the **Hours** field from a batch, then add it again, you need to reenter the number of hours for each time sheet in your batch.

► **Searching for duplicate time sheets in the batch**

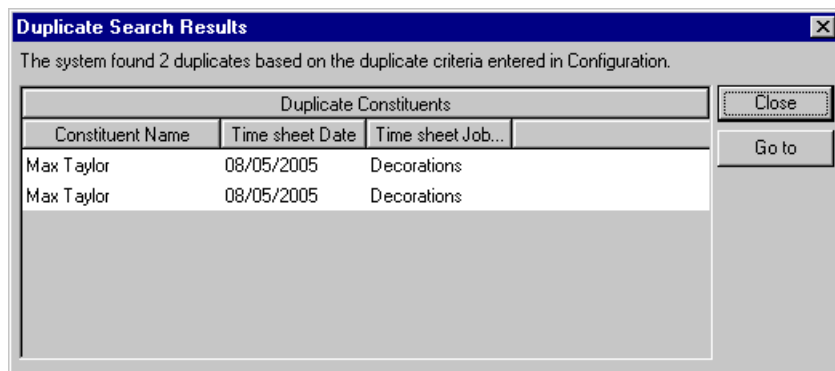
1. From the Data Entry screen of a time sheet batch, select **Constituent, Duplicate Search for Batch** from the menu bar. For more information about how to open a time sheet batch, see “Accessing a Time Sheet Batch” on page 229.



The Raiser's Edge searches for duplicate entries in the batch. If no duplicate records are found, a message appears.



2. If duplicate entries for a batch are found, the following message appears.



3. To quickly access the duplicate time sheet in the batch from the Duplicate Search Results screen, select a duplicate time sheet in the grid and click **Go to**.
4. Click **Close**. You return to the Data Entry screen of the time sheet batch.

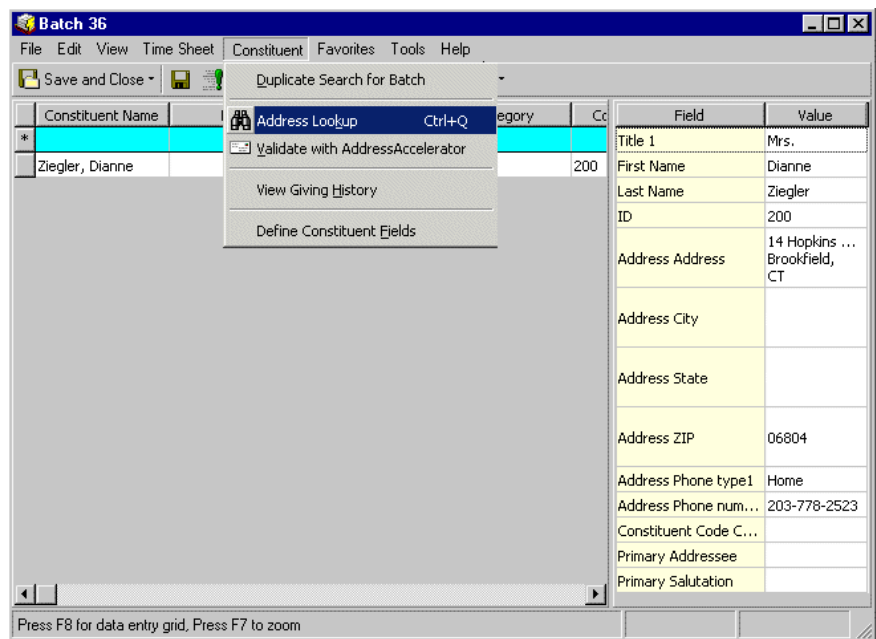
Accessing and Correcting Addresses for Constituents through a Time Sheet Batch

Note: Before you use the **Address Lookup** or **Validate with AddressAccelerator** menu options in *Batch*, make sure your *AddressAccelerator* data files are installed and linked correctly in User Options. For more information about how to set up these user options, press **F1** on any AddressAccelerator screen to access the help file.

When you have the address correction service *AddressAccelerator*, you can search for the city, state, and/or ZIP Code for a constituent's address on the Address Lookup screen. To look up and correct address information, you must work from the constituent window for a particular constituent. To view the constituent window, select **View, Constituent Window** from the menu bar. To update a constituent's address in *Batch*, select **Constituent, Validate with AddressAccelerator** from the menu bar of a time sheet batch. For more information about AddressAccelerator, press **F1** on any AddressAccelerator screen to access the help file.

► **Looking up an address for a constituent**

1. From a time sheet batch, put your cursor in any address field in the constituent window for which you want to find an address, and select **Constituent, Address Lookup** from the menu bar. For more information about how to enter time sheet information into a batch, see “Adding Time Sheets in the Data Entry Grid” on page 262.



Note: You can use shortcut keys to move around *The Raiser's Edge* without the use of your mouse. For example, to access the Address Lookup screen for a batch, press **CTRL + Q** on your keyboard.

The Address Lookup screen appears.

Address Lookup

City	State	ZIP
Brookfield	CT	06804
Brookfld Ctr	CT	06804

Open

Cancel

Search criteria:

City:

State:

ZIP:06804

Find Now

The available City, State, and ZIP Codes default into the Address Lookup grid.

2. Select the appropriate address information and click **Open**. The address information you selected appears in the address fields in the constituent window of the time sheet batch.

► **Correcting an address for a constituent**

Note: You can use shortcut keys to move around *The Raiser’s Edge* without the use of your mouse. For example, to access the AddressAccelerator screen for a batch, press **ALT + C, V** on your keyboard.

1. From a time sheet batch, put your cursor in any address field in the constituent window for which to find an address, and select **Constituent, Validate with AddressAccelerator** from the menu bar. For more information about how to enter time sheet information into a batch, see “Adding Time Sheets in the Data Entry Grid” on page 262.

Batch 37

File Edit View Time Sheet Constituent Favorites Tools Help

Save and Close

Duplicate Search for Batch

Address Lookup Ctrl+Q

Validate with AddressAccelerator

View Giving History

Define Constituent Fields

Constituent Name	Category	City	Field	Value
* Ferber, Jeffrey	204		Title 1	Mr.
			First Name	Jeffrey
			Last Name	Ferber
			ID	204
			Address Address	158 Craven ...
			Address City	Cincinnati
			Address State	OH
			Address ZIP	45201
			Address Phone type1	Business
			Address Phone num...	513-849-2231
			Constituent Code C...	Friend
			Primary Addressee	Mr. Jeffrey ...
			Primary Salutation	Mr. Ferber

Press F8 for constituent window, Press F3 for today's date, F7 for calendar

The Zip Browser screen appears.

Pre Dir.	Street Name	Suffix	Post Dir.
	HARRISON	LN	
	LOCUST	ST	

E/O	Primary	Building/Firm	E/O	Secondary	Zip+4	DP/CD
B	400-499				45255-3310	

From the Zip Browser screen, you can lookup states, cities, and street addresses to locate the constituent's correct address information.

Note: The address fields on the AddressAccelerator screen are editable. You can enter or change address information in these fields as you like and then click **Update Address** to validate the address information you enter.

2. Make any necessary selections and click **Update**. If the address still cannot be validated, a message appears to ask you to search for the address. To search for the address, click **Yes**. If the address can be validated, you return to the AddressAccelerator screen.

AddressAccelerator

Current Address Information

Constituent ID:
 Address Type:
 Address: 158 Craven
 County:
 City: Cincinnati
 State: OH ZIP: DPC:
 CART:
 LOT:
 DPC:

Choose the 'Update Address' button to update the current address information shown above with the validated address displayed below.

Address: 10500 Cranwood Ct ☐ Add footnote as an address attribute

City: Cincinnati

State: OH Ohio Date To Use: Today's date

ZIP: 45240-3422 DPC: 00 Comment:

County: Hamilton

CART: C019 LOT: A0062

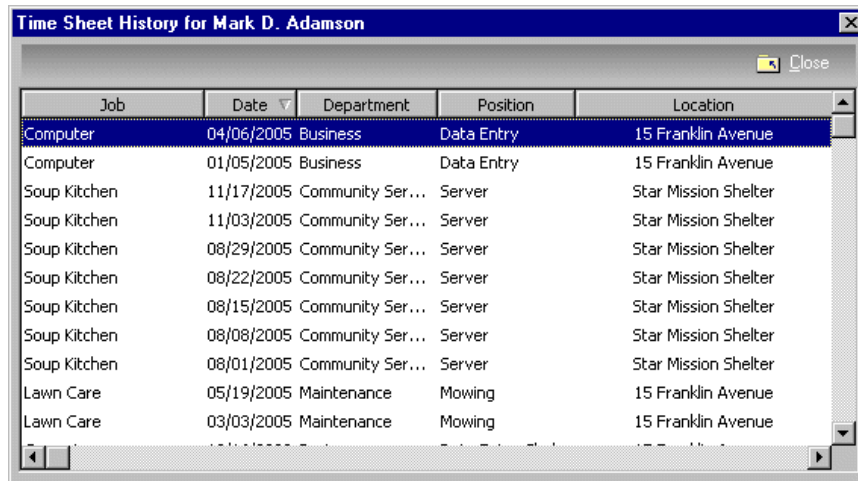
3. Click **Update Address**. The correct address information appears in the address fields in the constituent window.

Viewing Time Sheet History

To view a time sheet history for a constituent when you add time sheets in a batch, select **Constituent, View Time Sheet History** from the menu bar of a time sheet batch. When you select **Constituent, View Time Sheet History** from the menu bar, the Time Sheet History screen appears. You can view the job, date, department, position, and location for the constituents time sheets. For more information about time sheets and jobs, see the *Volunteers & Jobs Data Entry Guide*.

► Viewing time sheet history

1. From the Data Entry screen for a batch, put your cursor anywhere in the row of the constituent for whom you want to view time sheet history, and select **Constituent, View Time Sheet History** from the menu bar. The Time Sheet History screen appears. For more information about how to open a time sheet batch, see “Accessing a Time Sheet Batch” on page 229.



Job	Date	Department	Position	Location
Computer	04/06/2005	Business	Data Entry	15 Franklin Avenue
Computer	01/05/2005	Business	Data Entry	15 Franklin Avenue
Soup Kitchen	11/17/2005	Community Ser...	Server	Star Mission Shelter
Soup Kitchen	11/03/2005	Community Ser...	Server	Star Mission Shelter
Soup Kitchen	08/29/2005	Community Ser...	Server	Star Mission Shelter
Soup Kitchen	08/22/2005	Community Ser...	Server	Star Mission Shelter
Soup Kitchen	08/15/2005	Community Ser...	Server	Star Mission Shelter
Soup Kitchen	08/08/2005	Community Ser...	Server	Star Mission Shelter
Soup Kitchen	08/01/2005	Community Ser...	Server	Star Mission Shelter
Lawn Care	05/19/2005	Maintenance	Mowing	15 Franklin Avenue
Lawn Care	03/03/2005	Maintenance	Mowing	15 Franklin Avenue

2. When you are finished viewing the time sheet history for a constituent, click **Close**.

Group Adding Constituents to a Time Sheet Batch

To group add constituents to a time sheet batch, select **Tools, Group Add Constituents to Batch** from the menu bar of a time sheet batch. When you select to group add constituents to a batch, you can search for an existing query or create a new query of constituents you want to add to the time sheet batch. For more information about how to create and use queries, see the *Query & Export Guide*.

► **Group adding constituents to a time sheet batch**

1. From the Data Entry screen, select **Tools, Group Add Constituents to Batch** from the menu bar. The Open Query screen appears. For more information about how to open a time sheet batch, see “Navigating in Batch” on page 228.

2. Under **Find Queries that meet these criteria**, decide what criteria to use when you search for your query and enter the information in the appropriate fields.
3. Click **Find Now**. If the search criteria you enter match a query in the database, it lists in the grid on the Open screen. Depending on how limited or detailed your criteria are, the program may find one or more queries.
4. In the grid, select the query to access.
5. Click **Open**. The constituent names included in the specified query appear in the time sheet batch data entry grid.

Constituent Name	Date	Constituent ID	Department	Field	Value
Taylor, Max	8/23/2005	77	Education	Title 1	Mr.
Nodason, Marlena	8/23/2005	54	Education	First Name	Max
Garrity, Katherine	8/23/2005	179	Sporting Events	Last Name	Taylor
Frantz, Paul	8/23/2005	23	Community Service	ID	77
Connor, Benjamin		9		Address Address Lines	3327 Dawso...
Dustin, Nicole		16		Address City	Pittsburgh
McGrann, Orla		20		Address State	PA
Korbin, David		41		Address ZIP	15208
Kennick, Jennifer		42		Address Phone type1	Home
Avdeenko, Lucy		48		Address Phone num...	403-555-4579
Nivens, Lavern		56		Constituent Code Co...	Grandparent
O'Malley, Barrett		59		Primary Addressee	
Prescott, Sidney		64		Primary Salutation	
Rosenberg, Ira		69			
Ray, Scarlett		70			
Peters, Nancy					
Terrell, Emma		80			

Globally Change Fields in a Time Sheet Batch

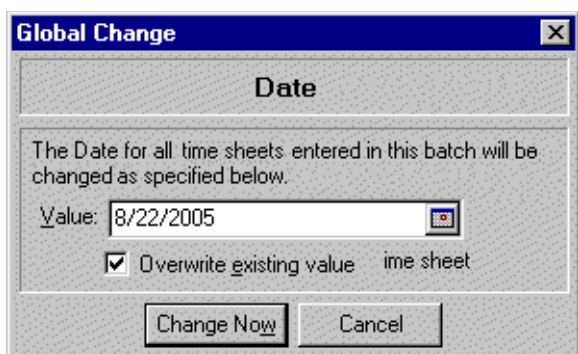
To globally change field values in a gift batch, select **Tools, Global Change** from the menu bar of a time sheet batch. It is useful to globally change time sheet fields in a time sheet batch to change a certain field value for time sheets entered in a batch. The field your cursor is in when you select **Tools, Global Change** from the menu bar determines which field you have access to change.

When you globally change fields in a batch, you alter the amounts and values for other information you entered in the batch. When you use the global change functionality, it is important to use caution.

► Globally changing fields in a time sheet batch

The field your cursor is in when you select to global change determines which field you access to change in the batch. This example uses the **Date** field. For more information about global change information, see the *Global Add, Delete, and Change Guide*.

1. From the Data Entry screen, click in the **Date** field and select **Tools, Global Change Date** from the menu bar. The Global Change screen appears. For more information about how to open a time sheet batch, see “Navigating in Batch” on page 228.



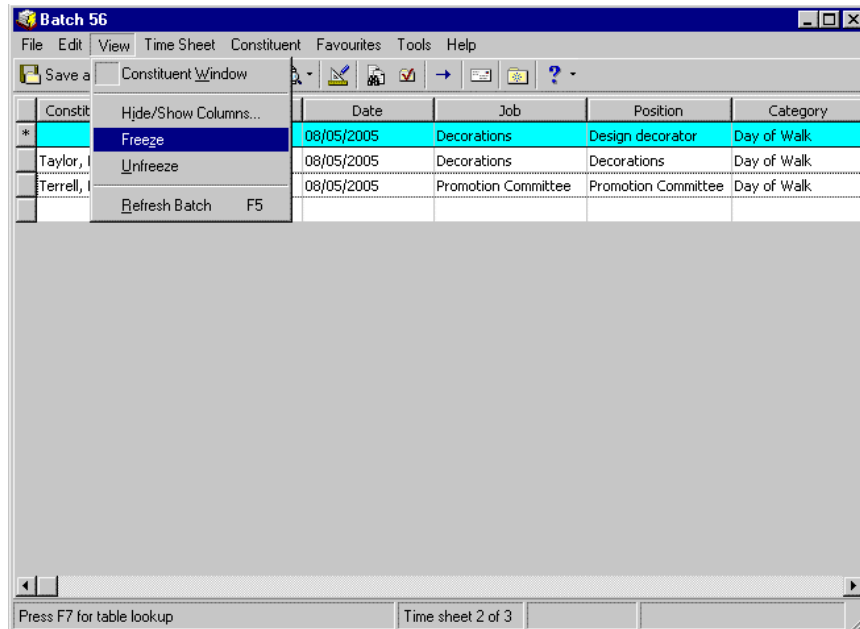
2. In the **Value** field, you can specify a new date to enter for the time sheets.
3. To overwrite the existing value in the **Value** field, mark **Overwrite existing value**.
4. Click **Change Now**. You return to the Data Entry screen. The change is reflected in the **Date** field.

Freezing and Unfreezing Columns in the Data Entry Grid

You can use the **Freeze** and **Unfreeze** menu options to lock and unlock all columns to the left of the column you select. For example, you may want to freeze the **Constituent Name** column so you can always view the name of the constituent for which you add a time sheet. When you freeze a column, it remains stationary and visible regardless of the horizontal direction you scroll. When you unfreeze a column, the columns move to the left or right corresponding to the horizontal direction you scroll. If the selected column is already frozen or unfrozen, the **Freeze** or **Unfreeze** options are disabled.

► Freezing a column in a batch

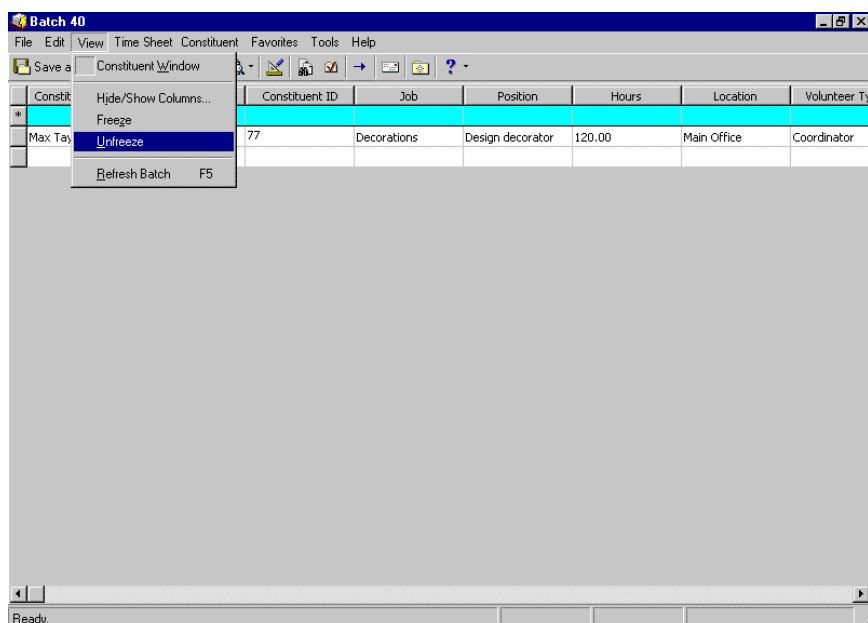
1. From the Data Entry screen for a batch, put your cursor in any row of the right-most column you want to freeze. For example, if you want to freeze the first three columns in the batch, put your cursor in any row in the third column in the batch and select **View, Freeze** from the menu bar.



2. When you use the horizontal scroll bar, the selected column and all columns to the left of this column remain stationary.

► Unfreezing a column in a batch

1. From the Data Entry screen for a batch, put your cursor in any row of the left-most column to unfreeze. For example, if the first three columns in the batch are frozen and you want to unfreeze the second and third column, put your cursor in any row in the second column in the batch and select **View, Unfreeze** from the menu bar.



2. The selected column and all columns to the right of this column are unfrozen. You can move to the left or right of the columns corresponding to the direction you scroll.

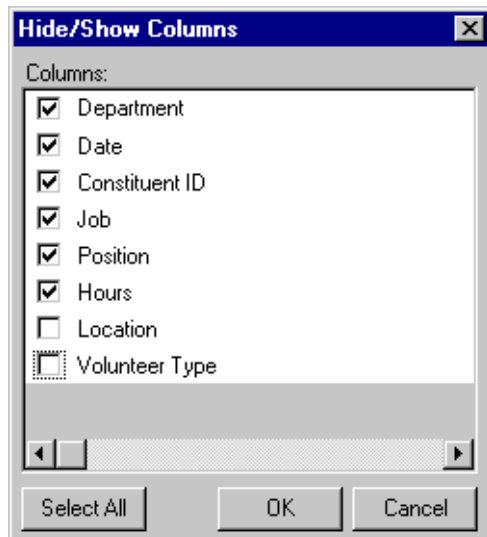
Hiding Columns and Viewing Hidden Columns in a Batch

When you select the same entry for a particular field for every time sheet in a batch, you can enter a default and hide the field. For example, you add time sheets for volunteers to a batch. Because each volunteer worked in the Soup Kitchen as a server for your organization, you add Server as the default for the **Job** field and hide the **Job** field. You cannot hide the **Constituent Name** field because your entry in this field is different for each constituent you add. You can use this procedure to determine the columns that are hidden or to display a hidden column.

► Hiding a column in a batch

Warning: If you have not entered a default for a field, you should not hide the field. Even though a hidden field is not visible on the Data Entry screen, it is still included in the batch and you need to enter data in the field.

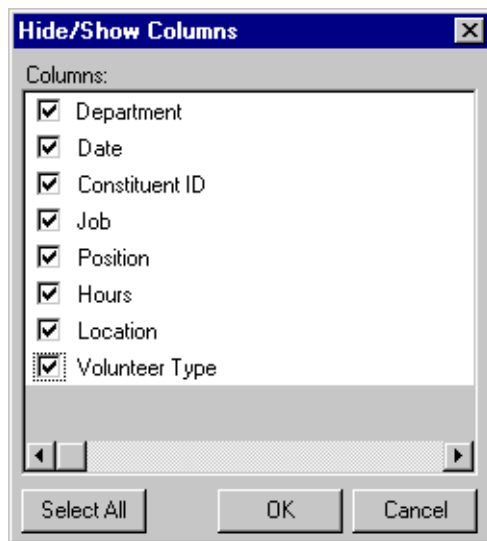
1. From the Data Entry screen for a batch, select **View, Hide/Show Columns** from the menu bar. The Hide/Show Columns screen appears.



2. Unmark the checkbox next to the columns to hide in the Data Entry grid.
3. Click **OK**. The columns you unchecked are now hidden in the batch.

► **Viewing hidden columns in a batch**

1. From the Data Entry screen for a batch, select **View, Hide/Show Columns** from the menu bar. The Hide/Show Columns screen appears.



Note: To display all the columns in the Data Entry grid, click **Select All**

2. Mark the checkbox next to the columns to view in the Data Entry grid. For example, to view the **Location** column in the Data Entry grid, mark **Location**.
3. To display the selected columns in the Data Entry grid, click **OK**.

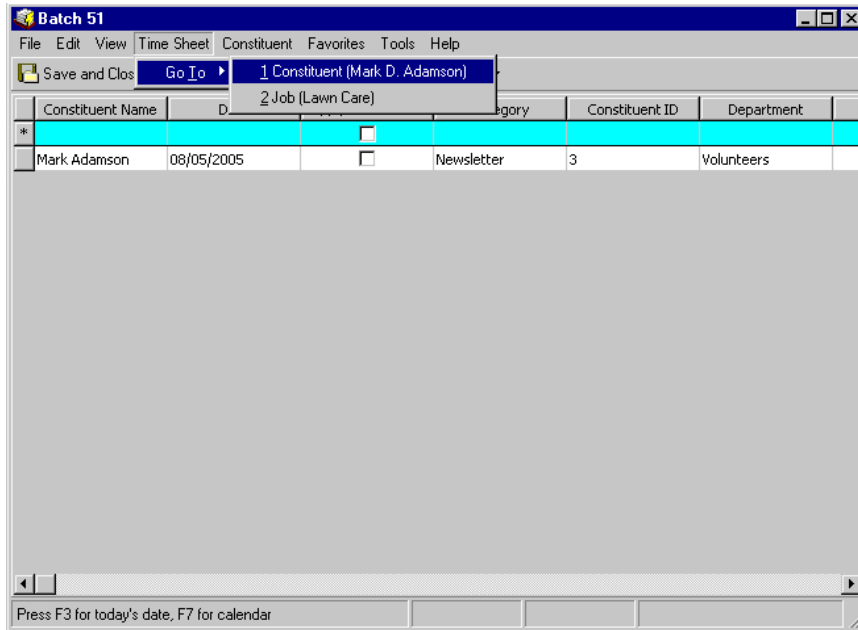
Go To Option in a Batch

The **Go To** option in *Batch* is a convenient way to go directly to a constituent record or job record without having to open the record from another area of the program and without having to close out of *Batch*. For example, when you click in the gift row for Mark Adamson and select **Time Sheet, Go To, Constituent** from the menu bar of a time sheet batch, you go directly to Mark Adamson's constituent record. When you finish viewing or changing the constituent record, you can close the record and immediately return to the time sheet batch you are working in.

Depending on what fields and other information you have entered in a time sheet row of a batch, your **Go To** menu can contain several options. For more information about the Go To option, see the *Program Basics Guide*.

► Using the Go To option in a time sheet batch

1. From the Data Entry screen for a batch, put your cursor anywhere in the row of the constituent for whom you want to use the **Go To** option, and select **Time Sheet, Go To, Constituent** from the menu bar. For more information about how to open a time sheet batch, see “Accessing a Time Sheet Batch” on page 229.



2. The constituent or job record appears. For more information about constituent records, see the *Constituent Data Entry Guide*. For more information about job records, see the *Volunteers & Jobs Data Entry Guide*.

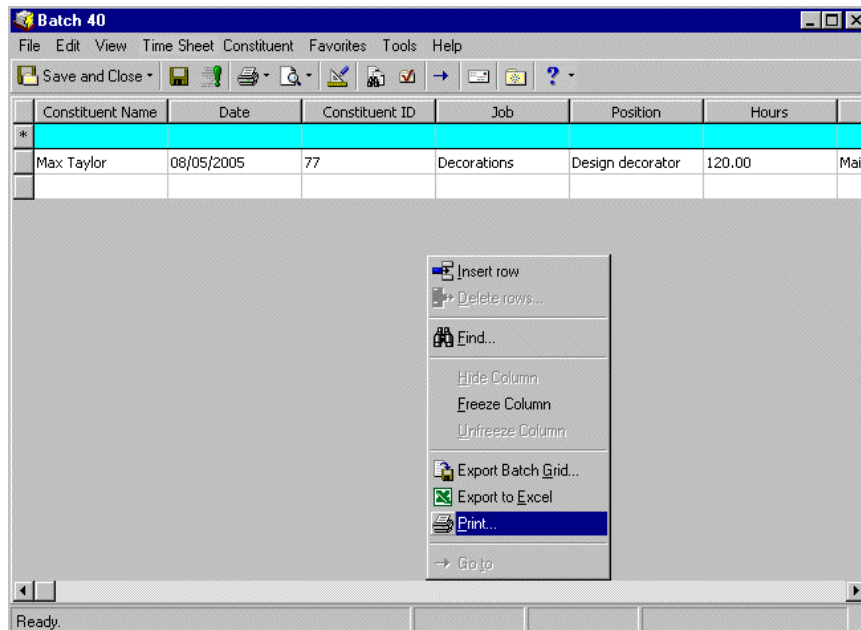
Printing Data from a Batch

You can use this procedure to print the current contents of the Data Entry grid.

► Printing the contents of the Data Entry grid

Note: To change your default printer, select **File, Print Setup** from the menu bar. For more information, see the *Program Basics Guide*.

1. From the Data Entry screen for a batch, right-click anywhere in the Data Entry grid. A shortcut menu appears. For more information about how to open a time sheet batch, see “Accessing a Time Sheet Batch” on page 229.



2. Select **Print**. A Print Grid Options screen appears where you can specify settings for printing. The contents of the Data Entry grid then print to your default printer.

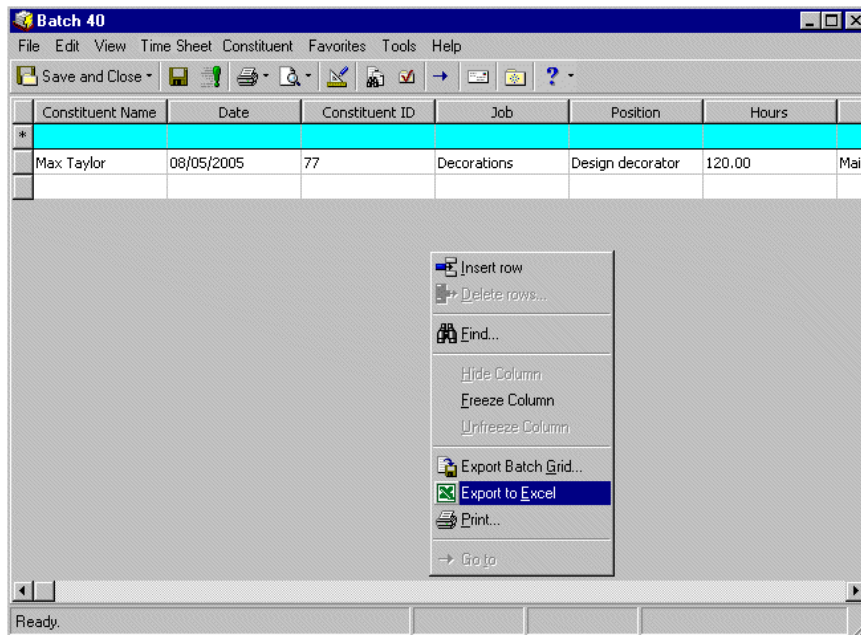
Exporting Data from a Batch

You can export the entire Data Entry grid to Microsoft *Excel* or to another application. When you select the Data Entry grid, all the data entered in the batch is exported to your selected application. It is useful to export data from a batch to compare data in the export to data in the batch. For example, you may want to do a quick spot check of the data you entered in the batch.

► Exporting the Data Entry grid to Microsoft Excel

Note: You can use shortcut keys to move around *The Raiser's Edge* without the use of your mouse. For example, to export the Data Entry grid to Microsoft *Excel*, press **ALT + E, E** on your keyboard. To export the Data Entry grid to another application, press **ALT + E, G** on your keyboard.

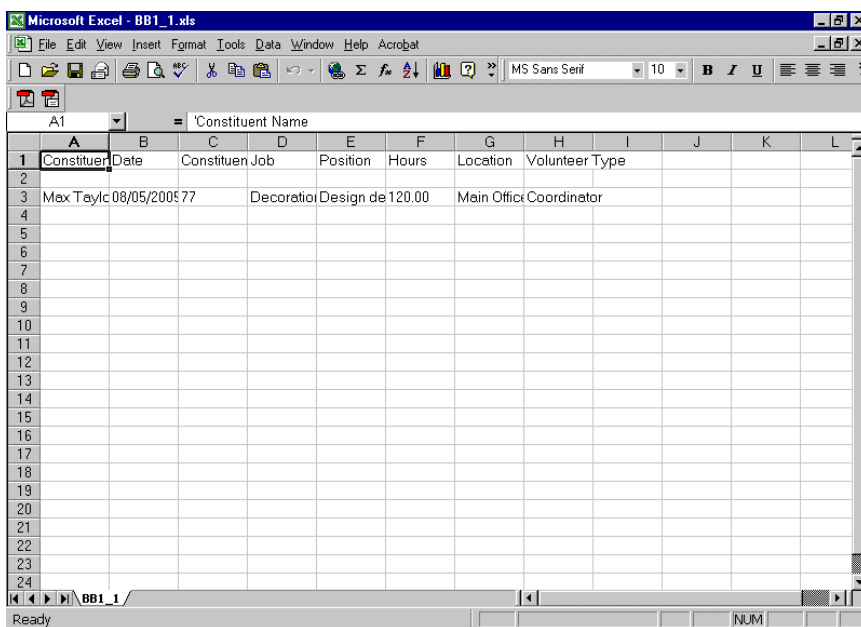
1. From the Data Entry screen for a batch, right-click anywhere in the Data Entry grid. A shortcut menu appears.



2. Select **Export to Excel**. The Exporting File screen appears and displays a progress indicator. In the lower left corner of this Options screen, the path and file name of the export file display.

Note: To stop the export and return to the Data Entry screen in *Batch*, click **Cancel** on the Exporting File screen.

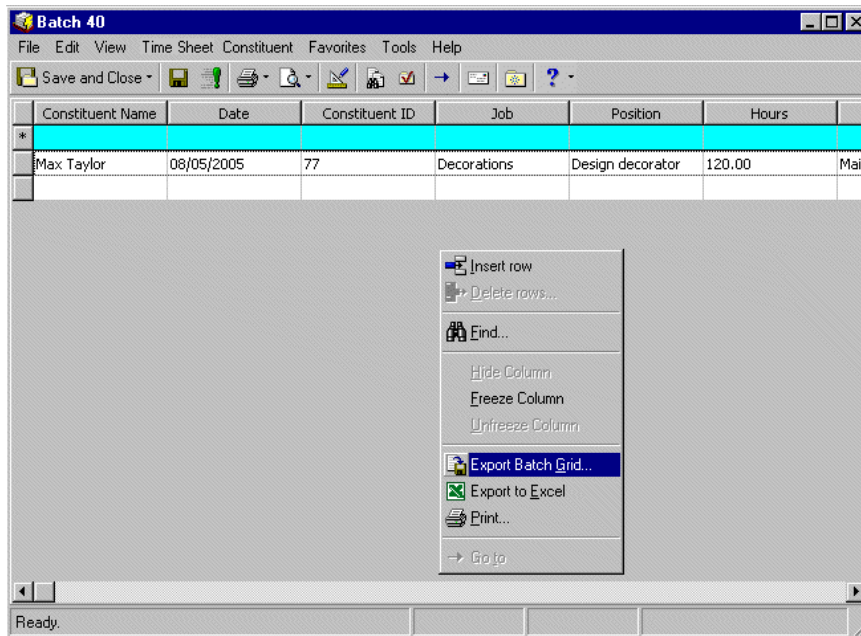
3. Microsoft *Excel* automatically opens and displays the information exported from the Data Entry grid in *Batch*.



4. To save any changes to the export file, select **File, Save** from the Microsoft *Excel* menu bar.

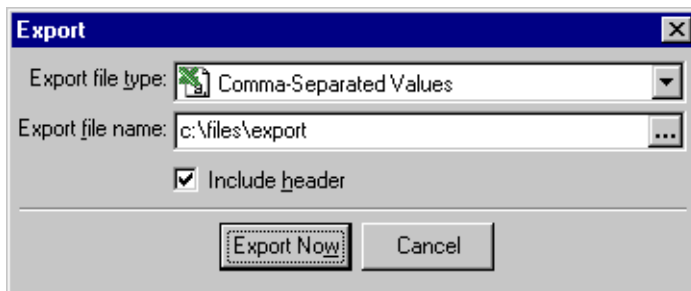
► **Exporting the Data Entry grid to another application**

1. From the Data Entry screen for a batch, right-click anywhere in the Data Entry grid. A shortcut menu appears.



Note: To stop the export and return to the Data Entry screen in *Batch*, click **Cancel** on the Export screen.

2. Select **Export Batch Grid**. The Export screen appears so you can choose the file type, location, and file name for the export file.



3. In the **Export file type** field, select the format for the export file. For more information about the available export formats, see the *Query & Export Guide*.
4. In the **Export file name** field, enter the name and location to store the export file. You can click the browse button to browse for the location to store the file.
5. If you want the first row of the export file to contain the column headings listed on the Data Entry screen, mark **Include header**.
6. To begin to export the Data Entry grid, click **Export Now**. The Exporting File screen appears and displays a progress indicator. In the lower left corner of this screen, the path and file name of the export file display.
7. When the Exporting File screen closes, the export is complete. You can open the export file with an application compatible with the **Export file type** you selected.

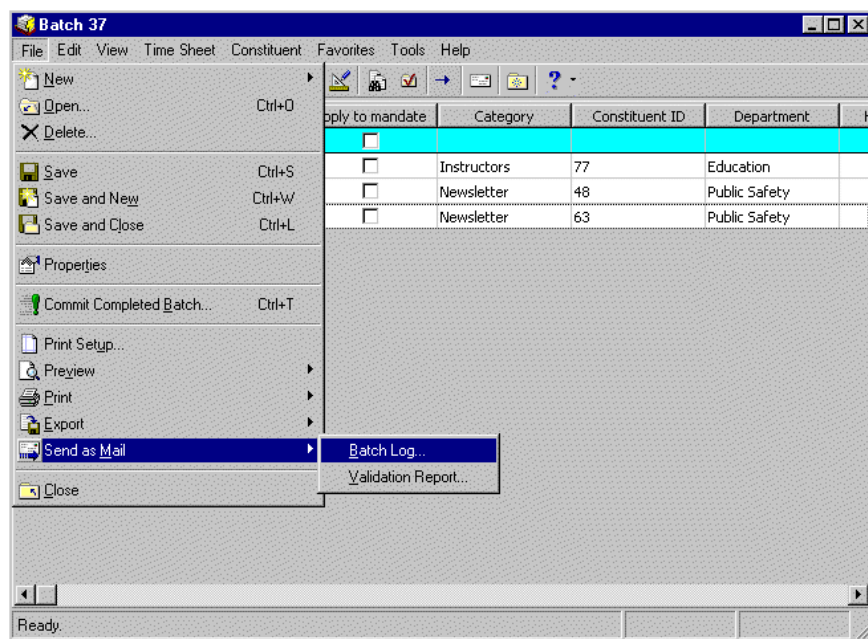
Sending a Time Sheet Batch Report as Email

Note: *The Raiser's Edge* is compliant only with MAPI email software, such as Microsoft *Outlook*.

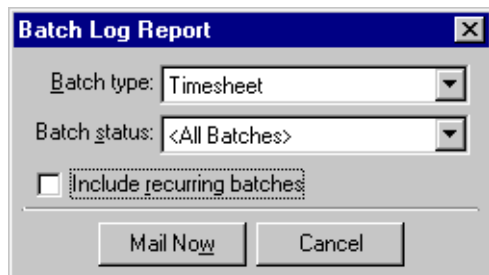
You can send information included in a batch report as email. For example, your Development Director is on a business trip and has requested a batch log report for time sheet batches you committed to the database this week. You can send all time sheet batch reports as an email. When you send data as email, you can select the type of format for the information you send, select the recipients of the email, and check the names and addresses of the recipients. As a reminder, sending batch report information as email and working with options in *Mail* are separate. For more information about *Mail*, see the *Mail Guide*.

► Sending a time sheet batch report as email

1. From the Data Entry grid, select **File, Send as Mail** from the menu bar. Select the type of report you want to send. For more information about how to open a time sheet batch, see “Accessing a Time Sheet Batch” on page 229.

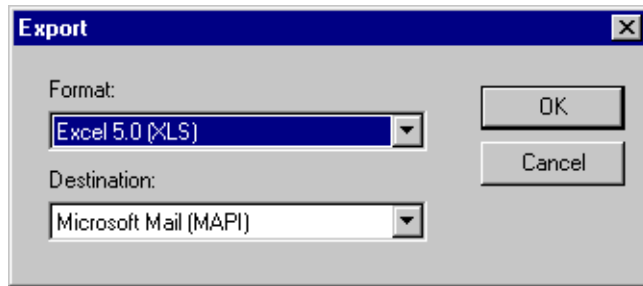


The Batch Log Report screen appears.

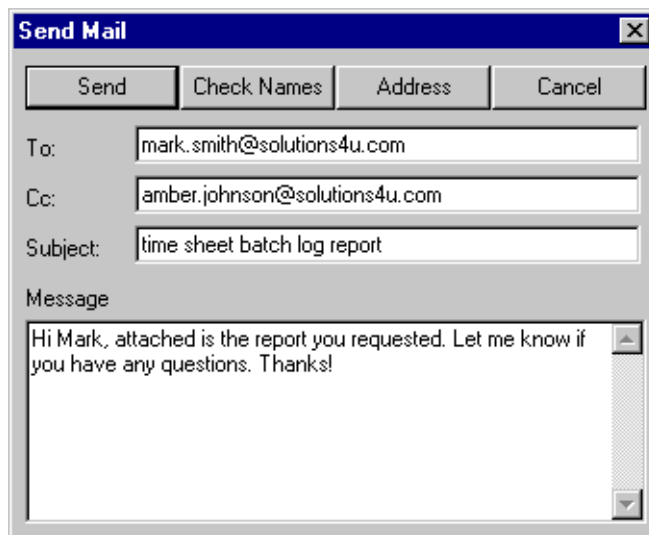


2. In the **Batch type** field, select the type of batch to include in the report. You can include constituent, gift, time sheet, or all batches.
3. In the **Batch status** field, select the status of batches to include in the report. You can include open, closed, or all batches.

- Click **Mail Now**. The Export screen appears.



- In the **Format** field, select the type of format in which to export the report. Some examples of format are Crystal Reports (RPT), Text, or Rich Text Format.
- In the **Destination** field, select "Microsoft Mail (MAPI)".
Messaging Application Program Interface (MAPI) is the application used to send mail from a queue. This program interface enables you to send email from within a *Windows* application, such as Microsoft *Word*, and include the open document as an attachment.
- Click **OK**. The Send Mail screen appears.

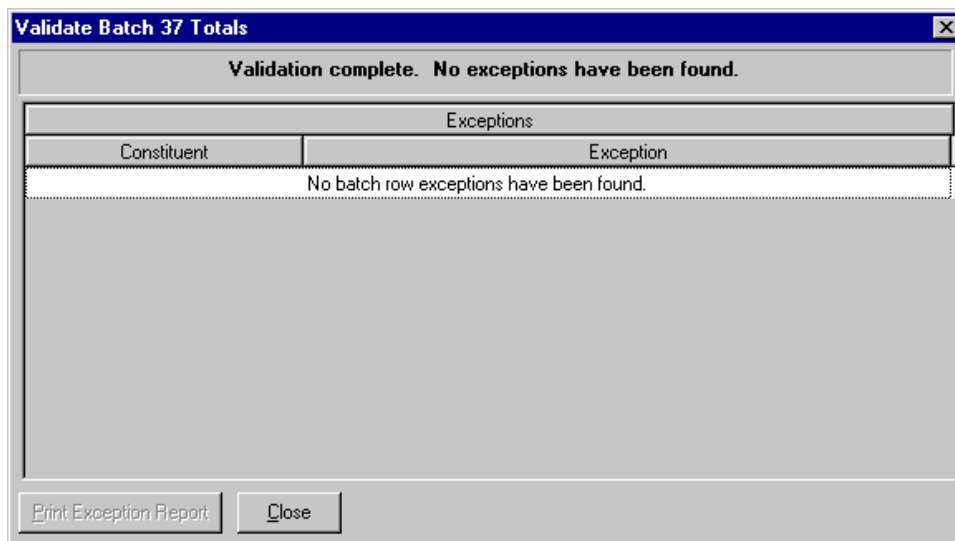


- Enter the information on the Send Mail screen as shown in the previous picture. The report information you send is automatically attached to the email in the format you specified. You do not see the information in the body of the email, but once you send the email, the information from the report is sent.
- On the Send Mail screen, click **Send**.

Validating a Batch

When you validate a batch, the program examines all time sheets entered in the batch to determine whether any data entry errors exist. For example, the volunteer you enter for a time sheet may not be a constituent in your database. During validation, *The Raiser's Edge* checks to make sure the volunteer for which you add information is a constituent in your database, and that the job record for which you add time sheet information exists.

When the program finishes its batch validation, the Validate Batch screen appears and displays the results of the validation process. Exceptions are created for any problem found in the batch and appear either on the Validate Batch screen or when you commit the batch to the database.



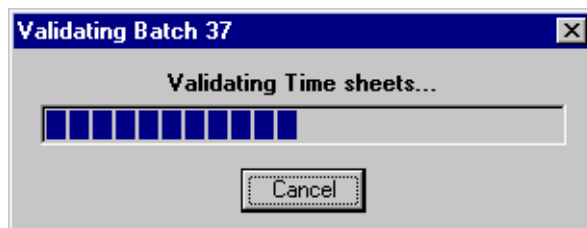
If any exceptions are found, you can correct the problem so the batch can be committed to the database without difficulty. If the program finds more than one exception on a single row, it displays only the first exception in the grid. You have the option to preview or print the exception report for the time sheets that could not be committed. For more information about how to commit time sheets to the database, see “Committing a Batch” on page 287.

► Validating a time sheet batch

Note: You can use shortcut keys to move around *The Raiser’s Edge* without the use of your mouse. For example, to validate a batch, press **ALT + T, V** on your keyboard.

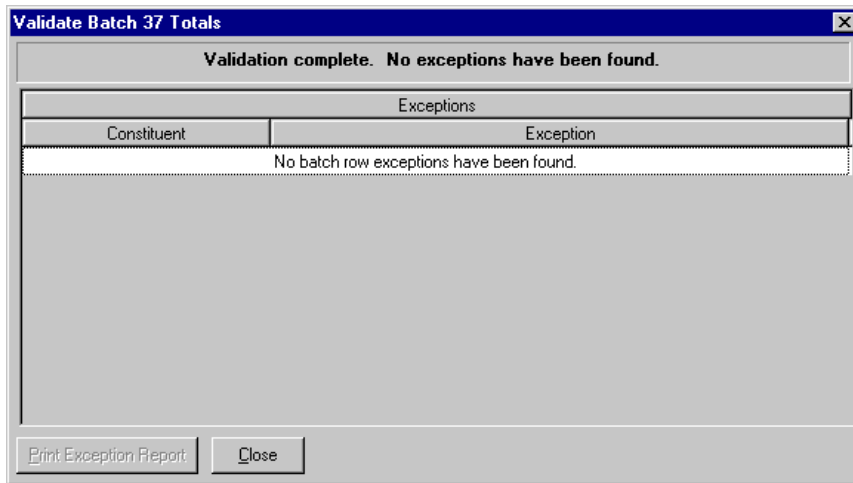
1. From the Data Entry screen of a time sheet batch, select **Tools, Validate** from the menu bar to begin the validation process. The Validate Time Sheet Batch screen appears. For more information about how to open a time sheet batch, see “Accessing a Time Sheet Batch” on page 229.

A status bar appears and displays the progress for the validation.



You can click **Cancel** to stop the validation of the batch and return to the Data Entry screen.

- When the program completes the validation process, the Validate Batch screen appears.



Warning: If the program finds more than one exception on a single row, it displays only the first exception in the grid. After you resolve all the exceptions, we recommend you validate the batch a second time to verify a single row did not have multiple exceptions.

At the top of the screen, the program displays a message to inform you of the status of the validation. If the program did not find any exceptions in the batch, the message “Validation complete. No exceptions have been found” appears. When the program finds one or more exceptions in the batch, the message “Validation complete. Exceptions have been found” appears. When the program finds exceptions, it displays the exceptions in the Exceptions grid.

- To print an exception report, click **Print Exception Report**. When exceptions are found in the batch, we recommend you print an exception report.
- To return to the Data Entry screen, click **Close**.

Committing a Batch

Note: You can use shortcut keys to move around *The Raiser’s Edge* without the use of your mouse. For example, to commit a constituent batch, press **CTRL + T** on your keyboard.

When you finish entering time sheets in the batch, you can commit the batch to add the new time sheets to your database.

► Committing a time sheet batch

1. From the Data Entry screen of a time sheet batch, select **File, Commit Completed Batch** from the menu bar. The Commit Time Sheet Batch screen appears so you can specify options the program uses when it commits the batch. For more information about how to open a time sheet batch, see “Accessing a Time Sheet Batch” on page 229.

Batch Statistics			
Number of time sheets:	0	Last committed on:	
Created on:	08/15/2005 3:09:29 PM	Created by:	Supervisor
Last changed on:	08/16/2005 11:27:34 ...		

Note: The **Batch Statistics** grid displays information about the constituents entered in the batch.

2. To create a query of constituents successfully committed to the database, mark **Create constituent query**. If you mark this checkbox, the Save Static Query screen appears before the program commits the batch to the database.
3. To print or preview a control report after you commit the batch to the database, mark **Create control report**. When you mark this checkbox, select whether you want to print or preview the control report. For more information about this report, see “Commit Control Report” on page 294.

Warning: When you mark **Create constituent query**, the program includes only the constituents with time sheets committed to the database. Any time sheets not committed to the database due to exceptions are not included in the query.

4. To delete the batch file after you commit the batch to the database, mark **Delete batch after committing**. Even though the program deletes the batch file, the batch number is never reused. To reduce the size of your database, you may want to mark this checkbox.
5. To begin to commit the batch to the database, click **Commit Now**.
6. If you marked **Create constituent query** on the Commit Time Sheet Batch screen, the Save Static Query screen appears.

7. In the **Query name** field, the program defaults “Volunteers from time sheet batch []”. You can use this name or enter a new name for the query.

8. In the **Description** field, the program defaults “Volunteers with time sheets committed from Batch []”. You can use this description or enter a new description for the query.
9. To allow other users to use this query, mark **Other users may execute this query**.

Warning: Only the information listed in the fields for a time sheet batch appears on a constituent’s time sheet record.

10. To allow other users to modify this query, mark **Other users may modify this query**.
11. Click **Save**. A progress indicator appears.
12. When the program finishes committing the batch, the Commit Batch screen appears.



This screen displays the batch number assigned to the time sheet batch you commit, number of time sheets in the batch file, number of time sheets the program was able to commit to the database, and number of time sheets the program was not able to commit to the database.

Note: If exceptions are created when you commit the batch, we strongly recommend you view or print the exception report so you can correct the discrepancies and recommit the batch.

13. If there are exceptions, you can click **Exception Report** to view an exception report. The exception report provides more detail about the time sheets the program was not able to commit to the database.
14. To close the Commit Batch screen, click **Close**.

After you commit a time sheet batch, time sheets successfully committed to the database are removed from the batch. Any time sheets with exceptions remain in the batch file so you can fix the discrepancy causing the exception and recommit the batch. When you recommit a time sheet batch, the same batch number is used.

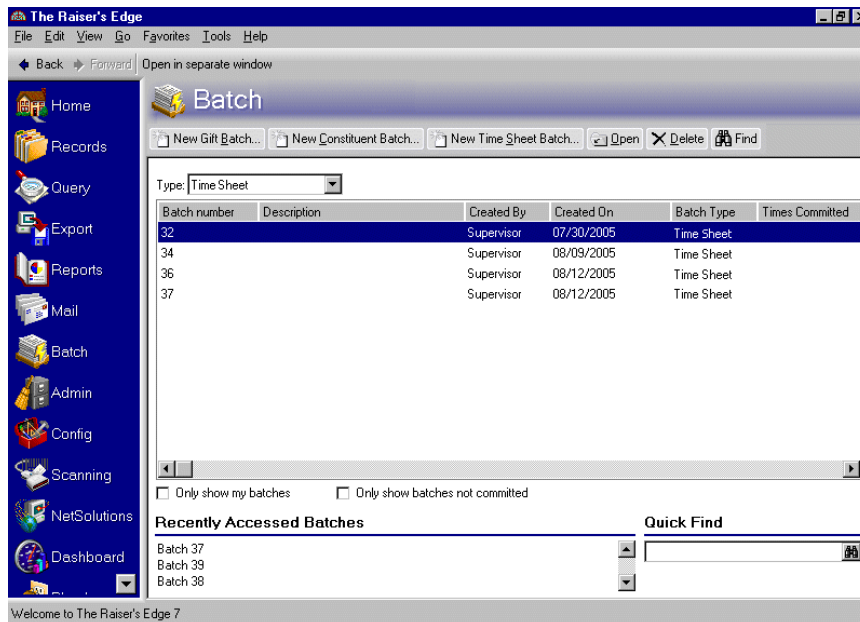
Deleting an Existing Batch

On occasion, you may want to delete a batch from your database. For example, after you commit a batch to your database, you may want to delete the batch so you can reduce the size of your database. You can delete a batch from the Batch page or the Data Entry screen. This section explains both methods to delete a batch from your database.

► Deleting an existing time sheet batch from the Batch page

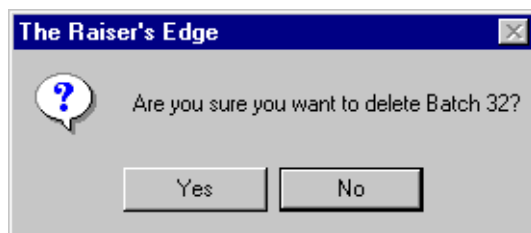
Note: To delete multiple batches at a time, select **Tools, Delete Multiple Batches** from the menu bar of the Batch page. To access this option, you can right-click on the Batch page. Once a batch is deleted, the batch number cannot be used again.

1. On the Raiser's Edge bar, click **Batch**. The Batch page appears.



2. In the grid, highlight the batch to delete.
3. On the action bar at the top of the screen, click **Delete**. If you do not have security rights to delete a batch, or **Other users may access this batch** is not marked and you did not create the batch, the message "User not authorized to delete this batch" appears.

If you do have security rights to delete a batch, a message appears.



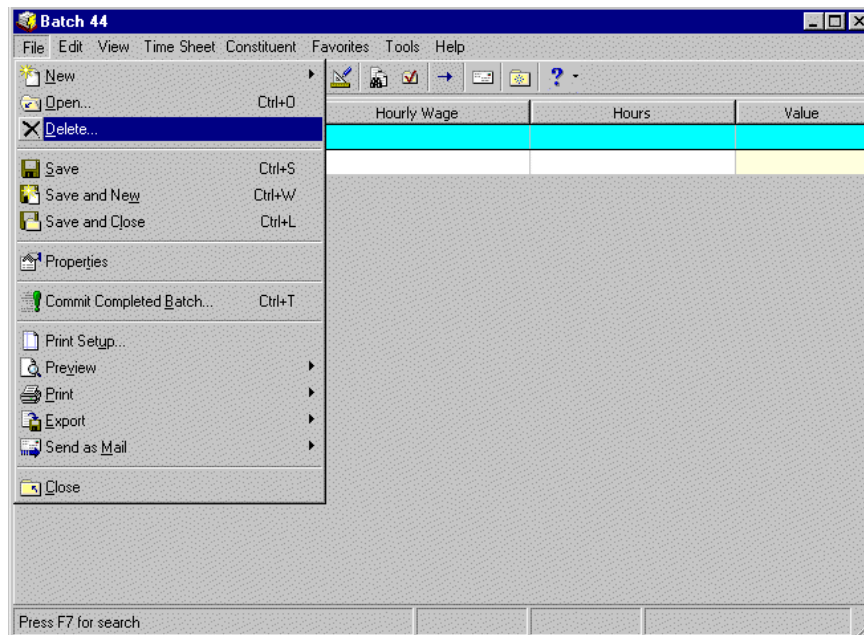
Warning: You cannot reuse a batch number even if you delete the batch associated with the batch number.

4. To delete the batch, click **Yes**. To return to the Batch page and not delete the batch, click **No**.

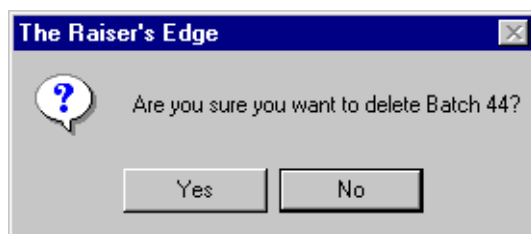
► Deleting an existing time sheet batch from the Data Entry screen

Note: To delete rows in a batch, select the row to delete and right-click. From the right-click menu, select **Delete rows**.

1. From the Data Entry screen of a time sheet batch, select **File, Delete** from the menu bar. For more information about how to open a time sheet batch, see "Accessing a Time Sheet Batch" on page 229.



A message appears.



2. To delete the batch, click **Yes**. To return to the Data Entry screen and not delete the batch, click **No**.

Batch Reports

Several time sheet batch reports are available to help you track the time sheets entered in a batch, record the settings selected when you commit a batch, and correct the exceptions generated when you commit a batch. This section explains the available reports and displays a sample of each report. If you use the optional module *Electronic Funds Transfer*, additional reports are available in *Batch*. For more information about EFT reports, see the *Electronic Funds Transfer (EFT) Guide*.

Validation Report

To keep a record of all time sheets entered in a batch, you can print a Validation report. This report is useful to make sure all the time sheet data was correctly entered in the batch. To print the Validation report, select **File, Print** from the menu bar. When the submenu appears, select **Validation Report**.

The screenshot shows a window titled "New Batch Validation Report" with a "Preview" tab selected. The report content is as follows:

7/13/2004

Blackbaud Demo
Time Sheet Batch Validation Report
Batch 200413

Date	Constituent Name	Job	Location	Hours
7/13/2004	Taylor, Max	Photographer	1428 Virginia Avenue	8.00
7/13/2004	Lambert, Marianne	Decorations	1428 Virginia Avenue	8.00
7/13/2004	Garrett, Jill	Refreshments	1428 Virginia Avenue	8.00
7/13/2004	Langley, Roger	Refreshments	1428 Virginia Avenue	8.00
7/13/2004	McNally, Leslie	Crowd Control	1428 Virginia Avenue	8.00
Totals:				40.00

Batch #: 200413
Description:
Created By: Supervisor
Batch Status: Open

You can also preview or print a time sheet batch validation report when you commit the batch to the database. When you mark **Create control report** on the screen, you can either preview or print the validation report. The validation report includes the constituent name, date, and all other time sheet batch fields entered in the batch.

Batch Entry Log Report

To preview the Batch Entry Log Report, select **File, Preview, Batch Log** from the menu bar of a time sheet batch. You can select to preview constituent, gift, time sheet or all batches in the database. You can also select to preview open, closed, or all batches in the database.

The screenshot shows a dialog box titled "Batch Log Report" with the following options:

Batch type: Time sheet

Batch status: <All Batches>

☐ Include recurring batches

Buttons: Preview Now, Cancel

The Batch Entry Log Report lists information for all or selected batches in your database. For example, the Batch Entry Log Report can contain the batch description number, running number of time sheets in a batch, and status of a batch. Before you print the Batch Entry Log Report, we recommend you print it. To print the report, select **File, Print, Batch Log** from the menu bar of a time sheet batch. From the Batch Entry Log Report preview, you can also select to print the Report or export the Report to another application.

08/19/2005

**Blackbaud Demo
Batch Entry Log Report**

Page

Gift Batches

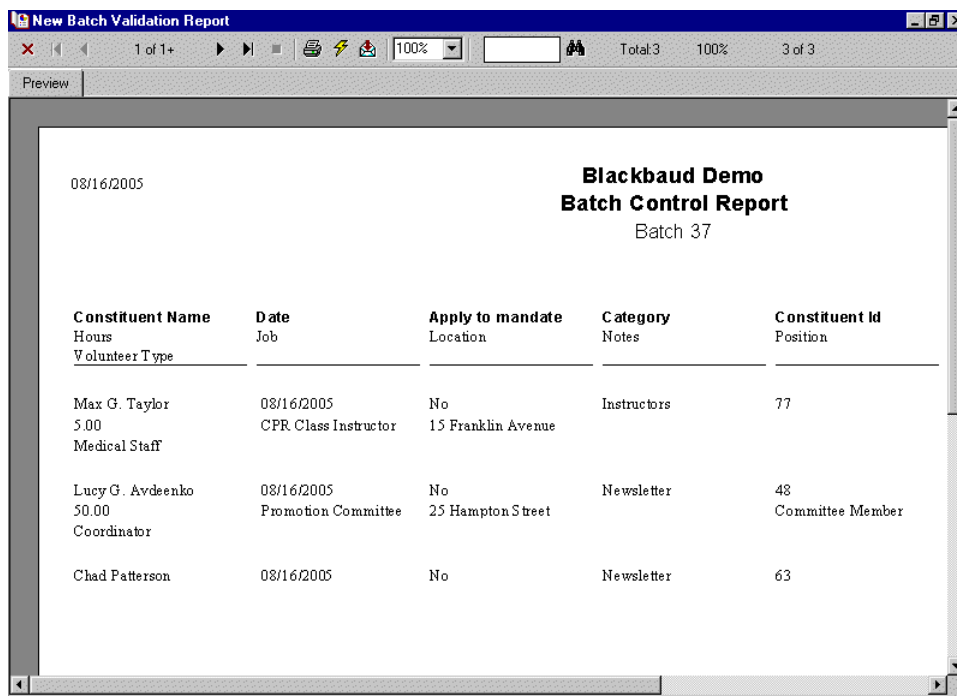
Batch Number	Description	CreatedBy	Projected Amount	Projected No. Gifts	Running Amount	Running No. Gifts	Status
21		Supervisor			\$9,990.00	25	Open
All recurring gifts due as of 1/1/2005							
27		Supervisor			\$8,996.50	22	Closed
28		Supervisor					Open
29		Supervisor					Open
31		Supervisor			\$200.00	2	Closed
33		Supervisor			\$9,789.06	30	Open
34		Supervisor			\$41,992.33	35	Open
47		Supervisor					Open
48		Supervisor					Closed
Total Gift Batches listed:			9				

Time Sheet Batches

Batch Number	Description	Created By	Number of Time sheets	Status
40		Supervisor	1	Open

Commit Control Report

When you mark **Create control report** on the Commit Time Sheet Batch screen, a control report previews or prints after you commit a batch to the database. The report includes the constituent name, date, and all other time sheet batch fields entered in the batch. To access the Commit Time Sheet Batch screen, select **File, Commit Completed Batch** from the menu bar of a time sheet batch. For more information about this screen, see “Committing a Batch” on page 287.



08/16/2005

**Blackbaud Demo
Batch Control Report**
Batch 37

Constituent Name Hours Volunteer Type	Date Job	Apply to mandate Location	Category Notes	Constituent Id Position
Max G. Taylor 5.00 Medical Staff	08/16/2005 CPR Class Instructor	No 15 Franklin Avenue	Instructors	77
Lucy G. Avdeenko 50.00 Coordinator	08/16/2005 Promotion Committee	No 25 Hampton Street	Newsletter	48 Committee Member
Chad Patterson	08/16/2005	No	Newsletter	63

Commit Exception Report

After the program commits a time sheet batch to the database, the Commit Time Sheet Batch screen appears and displays the results of the committing process. If exceptions are generated when the batch is committed to the database, you can click **Exception Report** on the Commit Batch screen to display the exception report.

Examples of exceptions for a time sheet batch are a constituent not existing in the database and a job not existing in the database. The total number of exceptions appear at the bottom of the exception report.

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