

Raiser's Edge Batch Quick Reference

Function Keys

Use function keys on your keyboard to quickly enter and access information throughout *The Raiser's Edge*.

F1 - access the help file

F4 - refresh some grids

F6 - access spouse screen (in const. window)

F7 - access calculators in currency fields

F2 - insert default value of a field (if one exists in a default set). The default entry replaces any existing entries

F4 - time or date stamp notepads

F7 - access lookups in tables

F7 - zoom in note fields to view larger text entry area

F3 - insert current date

F5 - refresh a batch

F7 - access calendars in date fields

F8 - toggle between constituent window and data entry grid

General Shortcut Keys

New - **CTRL** + **N**

Save and new - **CTRL** + **W**

Undo - **CTRL** + **Z**

Annotate - **CTRL** + **T**

Open - **CTRL** + **O**

Save and close - **CTRL** + **L**

Cut - **CTRL** + **X**

Go to File menu - **ALT** + **F**

Open in new window - **CTRL** + **I**

Copy - **CTRL** + **C**

Print - **CTRL** + **P**

Go to Help menu - **ALT** + **H**

Save - **CTRL** + **S**

Paste - **CTRL** + **V**

Find - **CTRL** + **F**

Add to Favorites - **ALT** + **A**

Batch Shortcut Keys

For shortcuts including the plus sign (**key + key**), press the keys simultaneously. For combinations with a comma (**key, key**), press the first key, release it, then press the next key. Some shortcuts contain both the plus sign and comma.

Batch Setup Screen

Batch Header Tab - **ALT** + **1**

History Button - **ALT** + **H**

Find button - **ALT** + **F**

Load From Existing Batch button - **ALT** + **L**

Fields Tab - **ALT** + **2**

Next - **ALT** + **N**

Up - **ALT** + **U**

*To mark a checkbox, use spacebar

Defaults Tab - **ALT** + **3**

Back - **ALT** + **B**

Down - **ALT** + **D**

Commit Batch - **CTRL** + **T**

Data Entry - **ALT** + **E**

Save button - **ALT** + **S**

Batch File Menu **ALT** + **F**

New Batch:

Constituent - **ALT** + **F, N, C**

Gift - **ALT** + **F, N, G**

Time Sheet - **ALT** + **F, N, T**

Commit Batch - **ALT** + **F, B**

Print Setup - **ALT** + **F, u**

Preview Batch Log - **ALT** + **F, v, B**

Preview Dep Ticket - **ALT** + **F, v, D**

Preview Validation Report - **ALT** + **F, v, V**

Preview Pre-transmission report - **ALT** + **F, v, P**

Preview Credit Card Report - **ALT** + **F, v, C**

Properties - **ALT** + **F, t**

Print Batch Log - **CTRL** + **P**

Print Deposit Ticket - **ALT** + **F, P, D**

Print Validation Report - **ALT** + **F, P, V**

Print Pre-transmission report - **ALT** + **F, P, P**

Print Credit Card Report - **ALT** + **F, P, C**

Export Batch Log - **ALT** + **F, E, B**

Export Deposit Ticket - **ALT** + **F, E, D**

Export Validation Report - **ALT** + **F, E, V**

Export Pre-transmission report - **ALT** + **F, E, P**

Export Credit Card Report - **ALT** + **F, E, C**

Send as Mail Batch Log - **ALT** + **F, M, B**

Send as Mail Deposit Ticket - **ALT** + **F, M, D**

Send as Mail Validation Report - **ALT** + **F, M, V**

Send as Mail Pre-transmission report - **ALT** + **F, M, P**

Send as Mail Credit Card Report - **ALT** + **F, M, C**

Close - **ALT** + **F, C**

Edit Menu [ALT] + E

Delete - [DEL]
 Insert Row - [ALT] + E, I
 Delete Rows - [ALT] + E, R
 Select Row - [ALT] + E, S
 Select All Rows - [CTRL] + A
 Export Gift Batch Grid -
 [ALT] + E, G
 Export Gift Batch Grid to
 Excel - [ALT] + E, E
 Find - [CTRL] + F

View Menu [ALT] + V

Constituent Window -
 [ALT] + V, W
 Pre-notifications - [ALT] + V,
 P
 Hide/Show Columns -
 [ALT] + V, I
 Freeze - [ALT] + V, Z
 Unfreeze - [ALT] + V, U
 Refresh Batch - [F5]
 Legend - [ALT] + V, L
 Move from cell to cell in
 batch grid - [CTRL] + Arrow
Key

Constituent Menu [ALT] + C

Duplicate Search for Batch -
 [ALT] + C, D
 Address Lookup - [CTRL] + Q
 AddressAccelerator - [ALT] +
 C, V
 View Giving History - [ALT] +
 C, H
 View Time Sheet History -
 [ALT] + C, H
 Define Constituent Fields -
 [ALT] + C, F

Favorites Menu [ALT] + F

Add to Favorites - [ALT] + A

Tools Menu [ALT] + T

Validate - [ALT] + T, V
 Group Add Constituents to
 Batch - [ALT] + T, G
 Global Change Type - [ALT] +
 T, L
 Auto-Generate
 Trans/Payments - [ALT] + T, A
 Create EFT Transmission
 Files - [ALT] + T, C
 Clear Declined Authorization
 Codes - [ALT] + T, D
 Edit Setup - [ALT] + T, B
 User Options - [ALT] + T, O
 Sort Batch - [ALT] + T, S

Gift Menu [ALT] + G

Access the Matching Gift screen
 - [CTRL] + M

Tribute screen - [CTRL] + B

Soft Credit screen - [ALT] + G, S

Split Gift - [ALT] + G, F

Benefits - [ALT] + G, N

Solicitors - [ALT] + G, C

Installment screen - [CTRL] + I

Add Payment to pledge
 screen - [CTRL] + D

View Overpayment Amount -
 [ALT] + G, W

Apply to Pledge - [CTRL] + Y

Apply to Recurring Gift -
 [ALT] + G, A, R

Link to Membership - [CTRL] +
 R

Link to Event Registration
 Fees - [CTRL] + E

Link to Event Other
 Donations - [CTRL] + N

Link to Event Sponsoring
 Pledges - [ALT] + G, L, E, P

Link to Proposal - [CTRL] + U

Go To - [ALT] + G, T

Currency Exchange -
 [ALT] + G, X

Gift Properties - [CTRL] + G

Acknowledgement History -
 [CTRL] + K

GL Distribution - [ALT] + G,
 D

Getting Help

Help for *The Raiser's Edge* is available in two main ways: the user guides and the help file.

User guides refer to pdfs and printed versions of all *The Raiser's Edge* user guides. These guides are useful when you need in-depth information about a specific area of the program. You can view guides on your computer, or you can print selected pages or entire guides.

These guides are available on the User Guides shell page. You can access the user guides in two ways:

- Click **Help** in the Raiser's Edge bar and select **User Guides**. The User Guides page appears listing all the available *Raiser's Edge* user guides.
- Select **Help, User Guides** from the menu bar. The User Guides page appears.

The help file is designed to give you quick answers; it contains a table of contents, index, and search features that enable you to find information about all areas of *The Raiser's Edge* from a single location. To access the help file:

- Press [F1] on your keyboard to open the help file to a topic with specific information about the screen you are currently on in the program
- Click **Help** in the Raiser's Edge bar and select **Help Topics**
- Select **Help, The Raiser's Edge Help Topics** from the menu bar

You can also access the most recent pdfs of the user guides from www.blackbaud.com. Select **Support, User Guides**.