

# The Raiser's Edge™

Conversion Guide

## **012512**

©2008 Blackbaud, Inc. This publication, or any part thereof, may not be reproduced or transmitted in any form or by any means, electronic, or mechanical, including photocopying, recording, storage in an information retrieval system, or otherwise, without the prior written permission of Blackbaud, Inc.

The information in this manual has been carefully checked and is believed to be accurate. Blackbaud, Inc., assumes no responsibility for any inaccuracies, errors, or omissions in this manual. In no event will Blackbaud, Inc., be liable for direct, indirect, special, incidental, or consequential damages resulting from any defect or omission in this manual, even if advised of the possibility of damages.

In the interest of continuing product development, Blackbaud, Inc., reserves the right to make improvements in this manual and the products it describes at any time, without notice or obligation.

All Blackbaud product names appearing herein are trademarks or registered trademarks of Blackbaud, Inc.

All other products and company names mentioned herein are trademarks of their respective holder.

RE7-Conversion-2012

# Contents



|                                                   |     |
|---------------------------------------------------|-----|
| WHAT IS IN THIS GUIDE? .....                      | III |
| CONVERSION .....                                  | 1   |
| Pre-Conversion Checklist .....                    | 4   |
| Running the Conversion Program .....              | 5   |
| Verifying Your Converted Data .....               | 17  |
| The Raiser's Edge 6 Post Conversion Utility ..... | 19  |
| What To Do after a Successful Conversion .....    | 35  |
| Post-Conversion Checklist .....                   | 46  |
| Field Mapping Guide .....                         | 49  |
| INDEX .....                                       | 199 |

# What Is In This Guide?



In the *Conversion Guide*, you learn detailed information about converting from version 6 of **The Raiser's Edge** to version 7.

- “Pre-Conversion Checklist” on page 4
- “Running the Conversion Program” on page 5
- “Verifying Your Converted Data” on page 17
- “The Raiser's Edge 6 Post Conversion Utility” on page 19
- “What To Do after a Successful Conversion” on page 35
- “Post-Conversion Checklist” on page 46
- “Field Mapping Guide” on page 49

## How Do I Use These Guides?

**The Raiser's Edge 7** 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 7** documentation from several places.

**User Guides.** You can access PDF versions of the guides by selecting **Help, User Guides** from the shell menu bar or by clicking **Help** on the Raiser's Edge bar in the program. You can also access the guides on our Web site at [www.blackbaud.com](http://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 learn about **The Raiser's Edge 7** by accessing the help file in the program. Select **Help, The Raiser's Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

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

# Conversion

|                                                                      |           |
|----------------------------------------------------------------------|-----------|
| <b>Pre-Conversion Checklist</b> . . . . .                            | <b>4</b>  |
| <b>Running the Conversion Program</b> . . . . .                      | <b>5</b>  |
| Converting on Machines with Dual Athlon Processors . . . . .         | 17        |
| <b>Verifying Your Converted Data</b> . . . . .                       | <b>17</b> |
| Checking Database Integrity . . . . .                                | 17        |
| Creating Queries, Exports, and Crystal Reports in Version7 . . . . . | 19        |
| <b>Printing Queries and Reports in Version 7</b> . . . . .           | <b>19</b> |
| <b>The Raiser's Edge 6 Post Conversion Utility</b> . . . . .         | <b>19</b> |
| Step 1: Deceased, Inactive, No Valid Address . . . . .               | 20        |
| Step 2: Solicit Codes . . . . .                                      | 22        |
| Step 3: Completed Actions . . . . .                                  | 23        |
| Step 4: Head of Household . . . . .                                  | 24        |
| Step 5: Primary Addressee and Primary Salutation . . . . .           | 26        |
| Step 6: Education Attributes . . . . .                               | 27        |
| Step 7: Volunteer Module . . . . .                                   | 28        |
| Step 8: Gift Record Cardholder Name . . . . .                        | 30        |
| Step 9: Regenerate Distributions . . . . .                           | 30        |
| Step 10: Data Processing . . . . .                                   | 32        |
| Step 11: Summary . . . . .                                           | 33        |
| Post-Conversion Details Report . . . . .                             | 34        |
| <b>What To Do after a Successful Conversion</b> . . . . .            | <b>35</b> |
| Actions . . . . .                                                    | 35        |
| Addresses . . . . .                                                  | 35        |
| Alumni School/College Default . . . . .                              | 36        |
| Credit Card Numbers . . . . .                                        | 36        |
| Crystal Reports . . . . .                                            | 36        |
| Installing Crystal Reports . . . . .                                 | 36        |
| Duplicate Constituent Criteria . . . . .                             | 42        |
| Events . . . . .                                                     | 42        |
| Field Characteristics . . . . .                                      | 42        |
| Gift Types . . . . .                                                 | 42        |
| International Address Fields . . . . .                               | 42        |
| Mail Merge Documents . . . . .                                       | 43        |
| Mailings . . . . .                                                   | 43        |
| Membership Card Name Default . . . . .                               | 43        |
| Membership Gift Defaults . . . . .                                   | 44        |
| Point of Sale . . . . .                                              | 44        |
| Profiles . . . . .                                                   | 44        |
| Queries and Exports . . . . .                                        | 44        |
| Relationship Education Information . . . . .                         | 44        |
| Reports . . . . .                                                    | 44        |
| Samples . . . . .                                                    | 45        |
| School Name Table . . . . .                                          | 45        |

|                                                                                                             |           |
|-------------------------------------------------------------------------------------------------------------|-----------|
| Security Groups . . . . .                                                                                   | 45        |
| Soft Credit Spouses . . . . .                                                                               | 45        |
| Tables . . . . .                                                                                            | 45        |
| User Defaults . . . . .                                                                                     | 46        |
| User Options . . . . .                                                                                      | 46        |
| <b>Post-Conversion Checklist . . . . .</b>                                                                  | <b>46</b> |
| <b>Field Mapping Guide . . . . .</b>                                                                        | <b>49</b> |
| Constituent Biographical Information for Individuals (Bio 1 and Bio 2 Tabs) . . . . .                       | 49        |
| Constituent Biographical Information for Organizations (Bio 1 tab and Bio 2 Tabs) . . . . .                 | 58        |
| Address Information for Individuals and Organizations . . . . .                                             | 61        |
| Individual Addresses . . . . .                                                                              | 61        |
| Organization Addresses . . . . .                                                                            | 63        |
| Address Types Table . . . . .                                                                               | 65        |
| International Address Fields . . . . .                                                                      | 66        |
| Additional Address Information – Alternate Addresses, Contacts, Business, Spouse, Spouse Business . . . . . | 69        |
| Phone Information . . . . .                                                                                 | 76        |
| Constituent Bank Information . . . . .                                                                      | 76        |
| Business Information for Individuals . . . . .                                                              | 78        |
| Education Information . . . . .                                                                             | 84        |
| Education Attributes . . . . .                                                                              | 86        |
| Employ Information . . . . .                                                                                | 86        |
| Constituency Codes . . . . .                                                                                | 91        |
| Spouse Information for Individual Records . . . . .                                                         | 91        |
| Contact Information on Organization Records . . . . .                                                       | 96        |
| Addressees/Salutations for Individuals . . . . .                                                            | 100       |
| Relationship Information . . . . .                                                                          | 100       |
| Affiliation Information . . . . .                                                                           | 100       |
| Constituent Appeal Information . . . . .                                                                    | 106       |
| Constituent Notepad Information . . . . .                                                                   | 106       |
| Gift Information . . . . .                                                                                  | 106       |
| Split Gifts . . . . .                                                                                       | 111       |
| GL Distribution . . . . .                                                                                   | 112       |
| Reversals And Adjustments . . . . .                                                                         | 112       |
| Write – Offs . . . . .                                                                                      | 115       |
| Stock and Sale of Stock . . . . .                                                                           | 116       |
| Matching Gift Information . . . . .                                                                         | 116       |
| Honor/Memorial Information . . . . .                                                                        | 120       |
| Recurring Gift information . . . . .                                                                        | 121       |
| Gift Attributes . . . . .                                                                                   | 123       |
| Actions Information . . . . .                                                                               | 123       |
| Action Attributes Information . . . . .                                                                     | 124       |
| Media Information . . . . .                                                                                 | 124       |
| Constituent Attribute Information . . . . .                                                                 | 125       |
| Constituent Solicitor Information . . . . .                                                                 | 126       |
| Assigned Solicitors Grid . . . . .                                                                          | 126       |
| Constituent Solicitor Information continued . . . . .                                                       | 126       |
| Honor/Memorial Optional Module . . . . .                                                                    | 128       |
| Volunteer Optional Module . . . . .                                                                         | 129       |
| Volunteer Jobs . . . . .                                                                                    | 136       |
| Prospect Research Optional Module . . . . .                                                                 | 136       |
| Membership Optional Module . . . . .                                                                        | 140       |
| Events Optional Module . . . . .                                                                            | 143       |
| Campaigns, Funds, and Appeals . . . . .                                                                     | 162       |
| Appeals . . . . .                                                                                           | 162       |

|                     |     |
|---------------------|-----|
| Campaigns .....     | 164 |
| Funds .....         | 164 |
| Export .....        | 166 |
| Mail .....          | 171 |
| Query .....         | 176 |
| Reports.....        | 180 |
| Configuration ..... | 184 |
| Tables .....        | 194 |

## Procedures

|                                                           |    |
|-----------------------------------------------------------|----|
| Establishing a database for The Raiser's Edge 7.....      | 6  |
| Working with the Migrate Database Wizard .....            | 7  |
| Working with the Attach Database Wizard .....             | 12 |
| Checking database integrity.....                          | 17 |
| Running the Raiser's Edge 6 Post Conversion Utility ..... | 19 |
| Uninstalling Crystal Reports 7 (or lower) .....           | 36 |
| Installing Crystal Reports Standard 8.5 .....             | 38 |

Before you begin the conversion process, take time to thoroughly research and plan for the new features and functionality in **The Raiser's Edge** by reading the *Conversion Planning Guide*. Like building a home, the most important first step is a solid foundation. If you carefully plan and prepare your data for the conversion using the information in the *Conversion Planning Guide*, you can successfully convert to **The Raiser's Edge 7**.

**Note:** Information in this guide is subject to change. Please visit our Web site at [www.blackbaud.com](http://www.blackbaud.com) to view the most current information before you begin planning your conversion to **The Raiser's Edge 7**. We recommend periodically visiting our Web site during your planning process to view updated requirements or additional conversion information.

The first step is to upgrade your database to version 6.42. If you currently have version 6.42 installed, you can install **The Raiser's Edge 7**. You can then convert the information in your version 6.42 database to version 7. For more information about installing version 7, see the *Installation Guide*.

Your version 6.42 database uses the *SQL Anywhere* database created by Sybase, Inc., to store information. **The Raiser's Edge 7** uses a Microsoft *SQL Server Desktop Engine* database. This version of *SQL Server* works with **Raiser's Edge** databases smaller than 1.8 GB. **The Raiser's Edge 7** installation (for your conversion) process confirms your database size before the software installation begins. If your **Raiser's Edge** database exceeds this limit, the installation terminates. You must purchase and install Microsoft *SQL Server Standard Edition* before continuing with the installation and conversion process. You must also use *SQL Server Standard Edition* if you have more than ten concurrent users.

The *SQL Server Raiser's Edge* database is fast and efficient. In addition, with the *SQL Server Raiser's Edge* database, you do not have to stop your database to back up your data. You can create backups while the database is running in version 7. For more information about *SQL Server* and the *SQL Server Desktop Engine*, see the *Installation Guide*.

In this guide, we take you through the actual conversion process and explain how to verify your data and determine the success of your conversion. We also explain how global change selections you make using the Post-Conversion Utility affect your data. Once the conversion completes, you can further organize and customize your database.

If you have any questions about the location of information in your database, you can use the field-mapping section to find the name and location of each field in version 7 that corresponds to the fields in your version 6.42 database.

## Pre-Conversion Checklist

**Note:** If you have any questions concerning your conversion, contact [resupport@blackbaud.com](mailto:resupport@blackbaud.com).

Once you complete the items listed in the "Data Preparation" and "Planning Is Key" checklists in the *Conversion Planning Guide*, you are ready to begin the actual conversion process. Read the following pre-conversion checklist items and mark each item in the list once you complete the task.

- ☐ Inform all users to exit **The Raiser's Edge** database. You cannot work in the program until the conversion process completes.
- ☐ Make a complete, valid backup of your version 6.42 database. To successfully back up your data, shut down the *SQL Anywhere* database.

**Warning:** Having enough free disk space is essential for a successful conversion. Before you convert, view the most up-to-date system recommendations. To access our system recommendations on the Web, select System Recommendations from the Support menu at [www.blackbaud.com](http://www.blackbaud.com).

- ☐ Determine the amount of free disk space. The following disk space requirements are subject to change. We strongly recommend you visit our Web site at [www.blackbaud.com](http://www.blackbaud.com) to view detailed system requirements before you convert.

During the conversion, the program creates temporary files in the conversion process. For a successful conversion, you must have free disk space equivalent to your 6.42 database, plus seven times the size of this database, plus an additional 500 MB of free disk space available.



For example, if your current database is 200 MB, you need at least 200 MB (the size of the database), plus 1.4 GB (seven times the database size), plus an additional 500 MB of free disk space for a minimum of 1.9 GB available for the conversion process. The recommended available disk space is an estimate only. If your organization converts multiple databases to **The Raiser's Edge 7**, you must convert each database individually, so you must determine the amount of free disk space needed for each database you want to convert.

Again, the recommended disk space stated is an average and may not be great enough for your conversion. Visit [www.blackbaud.com](http://www.blackbaud.com) to view detailed system requirements.

- ☐ Copy and save your version 6.42 database to a separate location. We recommend you run the conversion using this database copy.
- ☐ Exit all *Windows* applications on the workstation where you are installing **The Raiser's Edge** version 7. We recommend you run the conversion program on a local computer.
- ☐ Close any virus scan programs. Virus detection programs can interpret the conversion process as contamination of existing files on the disk.
- ☐ Close any screen saver programs. Screen savers can cause memory conflicts.
- ☐ Close the **Microsoft Office** toolbar, if present, to prevent interference with the installation of some files.
- ☐ Run the Database Validation utility in *Database Administration* for your version 6.42 database. For information about running the Database Validation utility, see the *Conversion Planning Guide*.
- ☐ If errors appear in the Database Validation, run the Database Rebuild utility for your database. If no errors appear, do not rebuild your database. This is the first step in converting to version 7.
- ☐ Make a second backup of your version 6.42 database once you run the Database Validation utility.
- ☐ Stop **The Raiser's Edge** version 6.42 database engine before you convert. If the system is configured for multiple Blackbaud databases, you only need to stop **The Raiser's Edge 6.x** database.
- ☐ If you use the network versions of Blackbaud's **General Ledger** or **Education Administration**, start your **General Ledger** or **Education Administration** database before you begin the conversion.
- ☐ If you have Blackbaud's *Point of Sale*, you should process the Update The Raiser's Edge wizard, accessed from the Point of Sale screen, to update all records from *Point of Sale 6* to **The Raiser's Edge** version 6.42.
- ☐ **Academy Manager** is not supported with **The Raiser's Edge** version 7.71. **The Raiser's Edge 7.71** integrates with **The Education Edge** version 7.5. For more information about the release of **The Education Edge 7.5**, visit [www.blackbaud.com](http://www.blackbaud.com).
- ☐ If you are converting on a machine running dual Athlon processors, you need to disable one of the processors during the conversion and then enable it again once the conversion is complete. For more information, see "Converting on Machines with Dual Athlon Processors" on page 17.

## Running the Conversion Program

**Warning:** If you use the network version of Blackbaud's **General Ledger**, your **General Ledger** database should be running when you begin the conversion.

Before you run the conversion program, carefully read the *Conversion Planning Guide*. Remember, the conversion process takes time. The length of time required depends on the number of records in your database and the hardware you currently use, so schedule the conversion at a convenient time for your organization.

We recommend running the conversion on the fastest computer possible and in a local environment. When the conversion completes, you can familiarize yourself with the converted data and explore the new features of **The Raiser's Edge 7**.

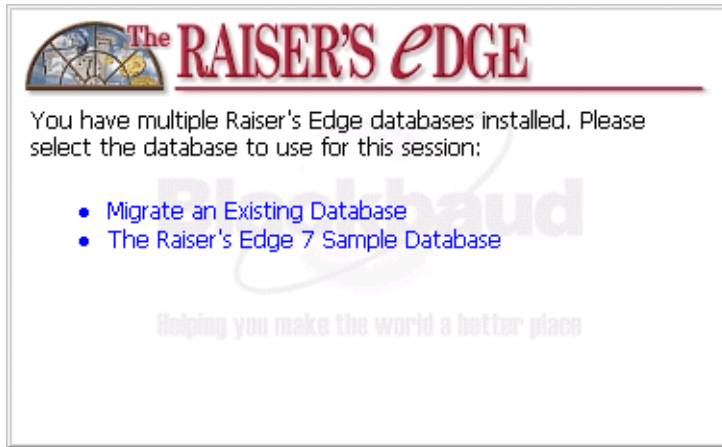
► **Establishing a database for The Raiser's Edge 7.7**

The following procedure is for both standalone and network users going from *The Raiser's Edge for Windows 6.4* to *The Raiser's Edge 7.7*.

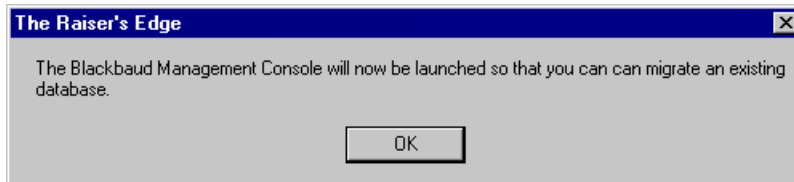
1. Access the Getting Started screen.

- Standalone users, from your desktop, double-click the *Raiser's Edge* shortcut.

A screen appears allowing you to **Migrate an Existing Database** or open *The Raiser's Edge* using **The Raiser's Edge Sample Database**.



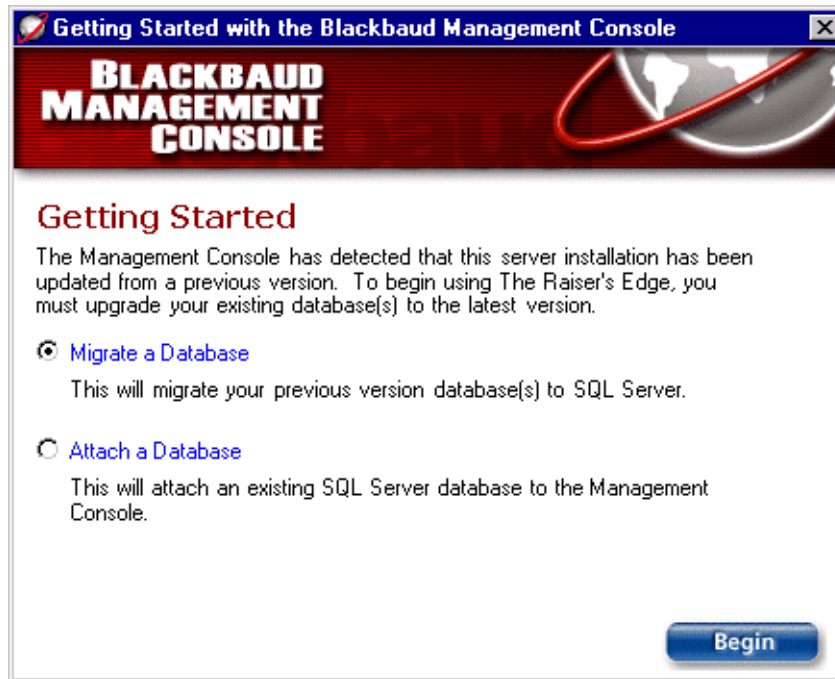
Select **Migrate an Existing Database**. A message appears, informing you the Blackbaud Management Console will launch.



Click **OK** to access the Getting Started screen. Proceed to step 2.

- Network users, from your desktop, double-click the Blackbaud Management Console shortcut. The Getting Started Screen appears.

2. The option you select on the Getting Started screen depends on what you want to accomplish:



- To manually migrate your ASA database into *MSDE*, click **Migrate a Database**, and click **Begin**. The Migration Database Wizard appears. See the next procedure, “Working with the Migrate Database Wizard” for detailed instructions about this wizard.
- If you have an existing *Raiser’s Edge SQL Server* database that you want to connect to the management console for use in *The Raiser’s Edge 7.7*, select **Attach a Database**. The Attach Database Wizard appears. See “Working with the Attach Database Wizard” on page 12 for detailed instructions about this wizard.

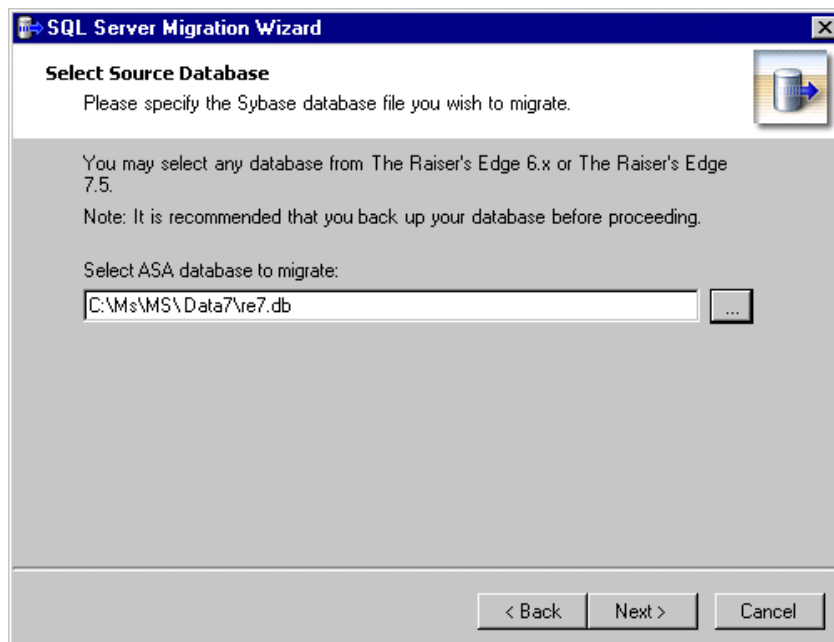
► **Working with the Migrate Database Wizard**

1. From the Getting Started screen, select **Migrate a Database**.
2. Click **Begin**. The Migrate Database Wizard opens.

3. From the Welcome to the Migrate Database screen, click **Next**.

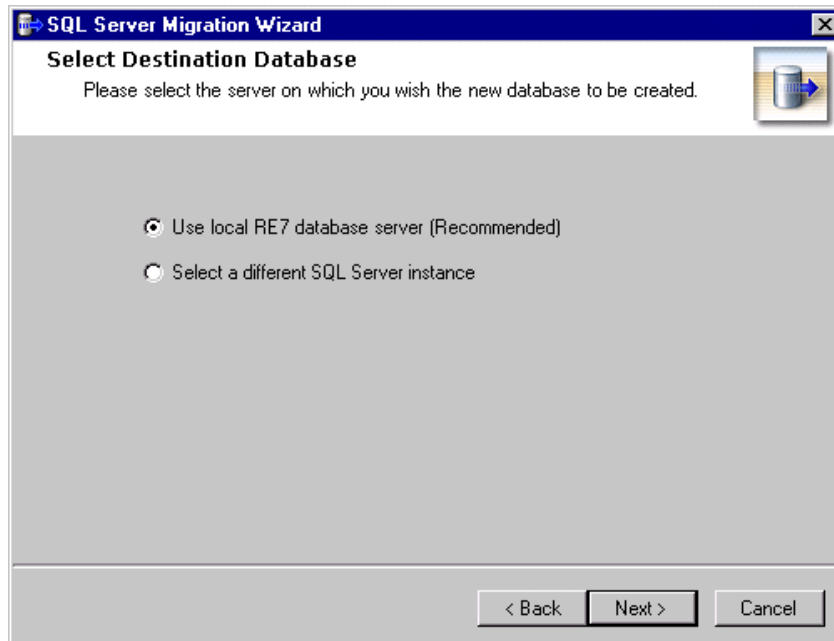


The Select Source Database screen appears.



4. In the **Select ASA database to migrate** field, enter the location of the ASA database you want to migrate. You can use the browse button to locate the database.
5. Click **Next**.

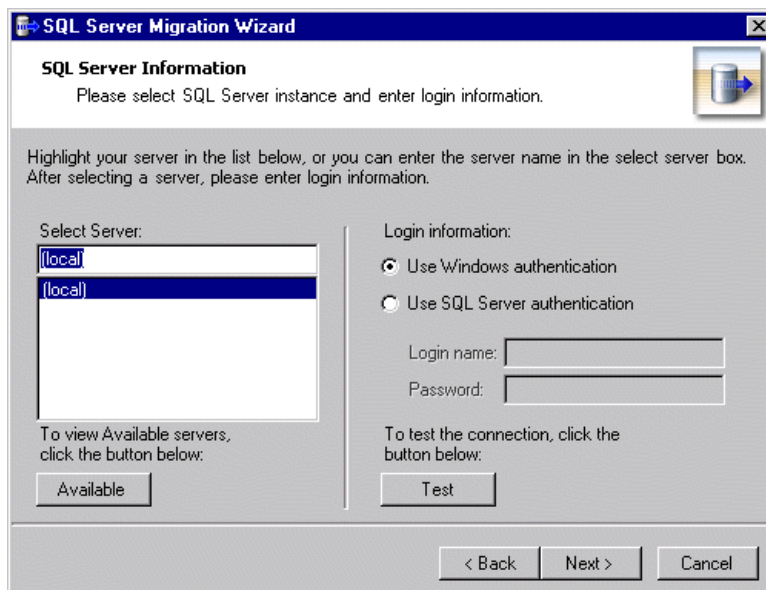
6. The Select Destination Database screen appears.



7. If you are using the **Raiser's Edge 7** database installed with the program, select **Use local RE7 database server** and proceed to step 8 in this procedure.

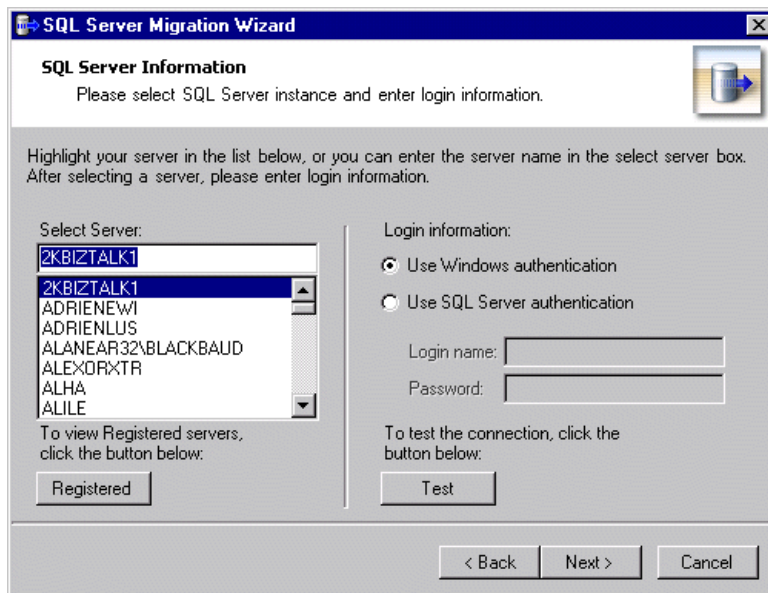
If you have a separate instance of Microsoft *SQL Server* installed that you want to use instead, choose **Select a different SQL Server instance** and perform the following steps.

- a. Click **Next**. The Server Information screen appears.



All registered servers appear in the **Select Server** box. A registered server is any server on your system controlled by SQL Server Management tools.

- b. If the server you want to use does not display in the **Select Server** box., click **Available** to access a list of all SQL Servers available on your network.



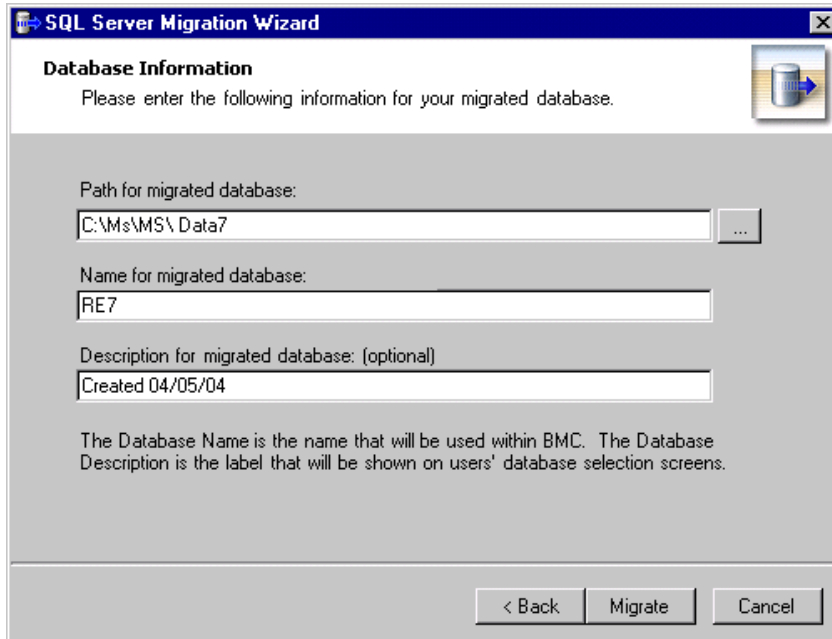
All available servers appear, and the button changes to read **Registered**.

- c. In the **Select Server** frame, select the server to which you want to migrate your database.

**Warning:** If you are not using the *MSDE* version of *SQL Server* included with *The Raiser's Edge 7.7* and your server is setup for Window Authentication only, you must use the SQL Enterprise Manager to add users to *The Raiser's Edge*. For more information, see the documentation included with your *SQL Server* software.

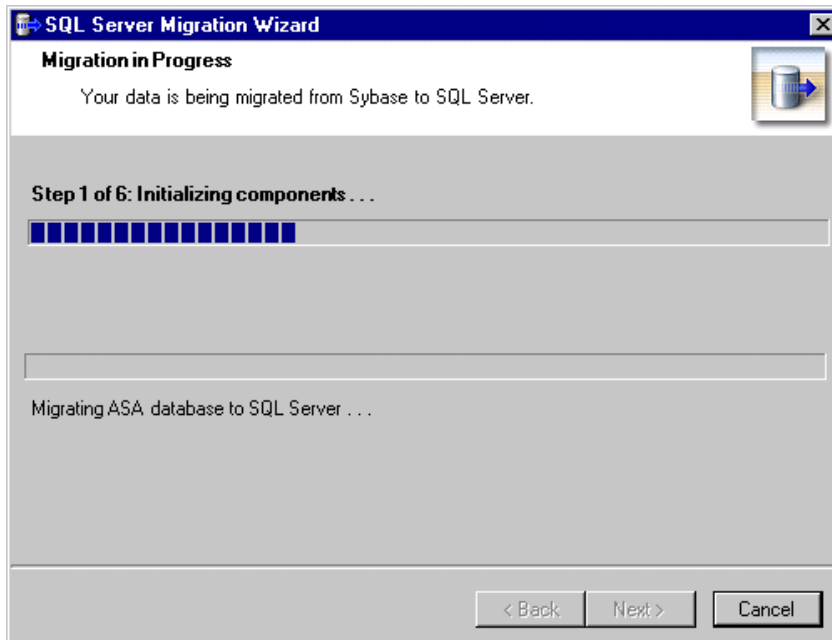
- d. In the **Login information** frame, select the type of authentication you want to use. Select **Use Windows authentication** if you have *SQL Server Standard/Enterprise Edition* configured to work with Windows authentication. This allows you to log into the server using the same **Login name** and **Password** you use to log into your system. Select **Use SQL Server authentication** if you established a **Login name** and **Password** in *SQL Server Standard/Enterprise Edition* using SQL Server authentication, and you want that login information used to access your server.
- e. If you select **Use SQL Server authentication**, you must enter a **Login name** and **Password** for the server.
- f. After you select a server, click **Test** to check the server connection. If the connection fails, check the login information and verify that you selected the correct server.

8. Click **Next** to continue. The Database Information screen appears.



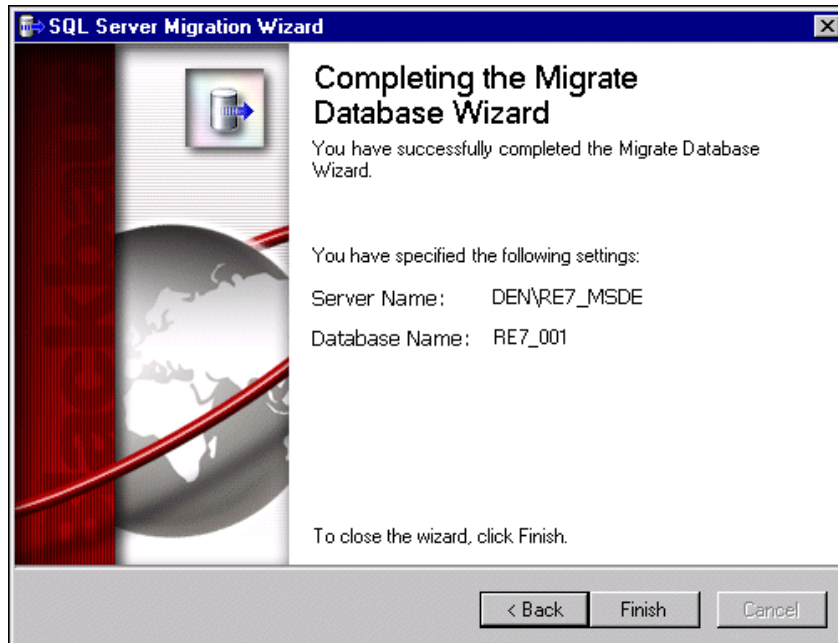
The screenshot shows the 'SQL Server Migration Wizard' window with the 'Database Information' tab selected. The window title is 'SQL Server Migration Wizard'. The tab is 'Database Information'. The text inside says 'Please enter the following information for your migrated database.' There are three input fields: 'Path for migrated database:' with the value 'C:\Ms\MS\ Data7' and a browse button (...); 'Name for migrated database:' with the value 'RE7'; and 'Description for migrated database: (optional)' with the value 'Created 04/05/04'. Below the fields is a note: 'The Database Name is the name that will be used within BMC. The Database Description is the label that will be shown on users' database selection screens.' At the bottom are three buttons: '< Back', 'Migrate', and 'Cancel'.

9. In the **Path for migrated database** field, enter a location for the database. You can use the browse button to map to the location. The folder you browse to must already exist.
10. In the **Name for migrated database** field, enter a name for the database. The name you enter is used to identify the database in the Blackbaud Management Console.
11. In the **Description for migrated database** field, enter a description of the database. This description appears on your workstations' database selection screen, helping your workstation users identify the database.
12. Click **Migrate** to continue. A processing screen appears while the database is migrated.



The screenshot shows the 'SQL Server Migration Wizard' window with the 'Migration in Progress' tab selected. The window title is 'SQL Server Migration Wizard'. The tab is 'Migration in Progress'. The text inside says 'Your data is being migrated from Sybase to SQL Server.' There is a progress bar labeled 'Step 1 of 6: Initializing components ...' which is partially filled with blue bars. Below the progress bar is a text box containing 'Migrating ASA database to SQL Server ...'. At the bottom are three buttons: '< Back', 'Next >', and 'Cancel'.

Once the migration is complete, the final screen of the Migrate Database Wizard displays.



13. Click **Finish** to complete the Migrate Database Wizard and return to the the Blackbaud Management Console screen.

You can begin working in *The Raiser's Edge 7.7*.

► **Working with the Attach Database Wizard**

1. From the Getting Started screen, select **Attach a Database**.
2. Click **Begin**. The Attach Database Wizard opens.

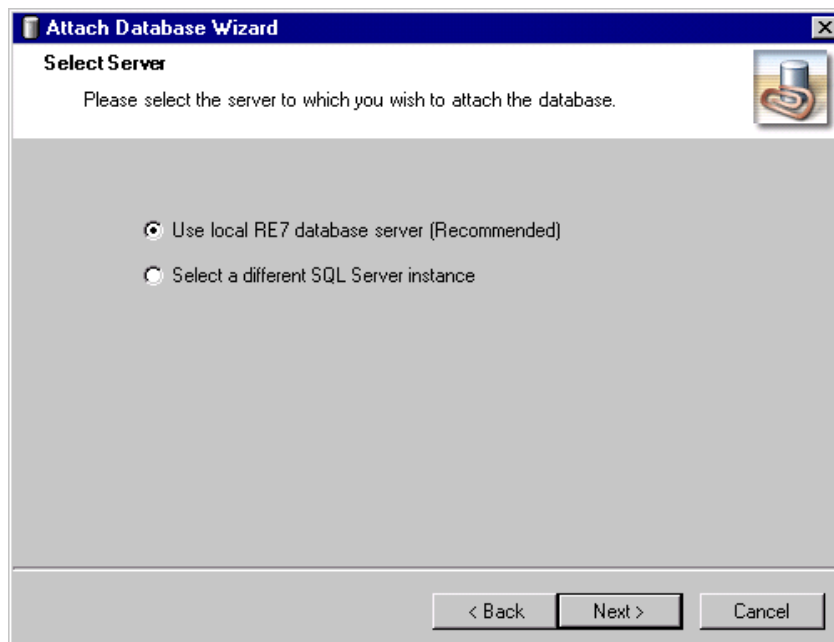
**Warning:** Even if you are running a full version of *SQL Server 2000 Standard* or *Enterprise*, you must attach databases to *The Raiser's Edge* using the Blackbaud Management Console. If you do not use the management console, you cannot access the databases from *The Raiser's Edge*.



3. From the Attach Database Wizard screen, click **Next**.



The Select Server screen appears.



4. If you are using the **Raiser's Edge 7** database installed with the program, select **Use local RE7 database server** and proceed to step 5 in this procedure.

If you have a separate instance of Microsoft *SQL Server* installed that you want to use instead, choose **Select a different SQL Server instance** and perform the following steps.

- a. Click **Next**. The Server Information screen appears

All registered servers appear in the **Select Server** box. A registered server is any server on your system controlled by SQL Server Management tools.

- b. If the server you want to use does not display in the **Select Server** box, click **Available** to access a list of all *SQL Servers* available on your network. All available servers appear, and the button changes to read **Registered**.

- c. In the **Select Server** frame, select the server to which you want to create a new database.
- d. In the **Login information** frame, select the type of authentication you want to use. Select **Use Windows authentication** if you have *SQL Server Standard/Enterprise Edition* configured to work with Windows authentication. This allows you to log into the server using the same **Login name** and **Password** you use to log into your system. Select **Use SQL Server authentication** if you established a **Login name** and **Password** in *SQL Server Standard/Enterprise Edition* using SQL Server authentication, and you want that login information used to access your server.

**Warning:** If you are not using the *MSDE* version of *SQL Server* included with **The Raiser's Edge 7.7** and your server is setup for Window Authentication only, you must use the *SQL Enterprise Manager* to add users to **The Raiser's Edge**. For more information, see the documentation included with your *SQL Server* software.

- e. If you select **Use SQL Server authentication**, you must enter a **Login name** and **Password** for the server.
  - f. After you select a server, click **Test** to check the server connection. If the connection fails, check the login information and verify that you selected the correct server.
5. Click **Next**. The Database Information screen appears.

**Attach Database Wizard**

**Database Information**  
Select from the two options.

Select from the options below and enter any required information. You can also enter a description which will be used when logging into The Raiser's Edge 7.

Attach: ☒ Existing database (MDF file) ☐ From backup file (BAK or ZIP file)

Parameters

Path to existing database: [To adjust file location\(s\), click here](#)  
C:\Program Files\BMC7\RE7\Data\RE7.mdf

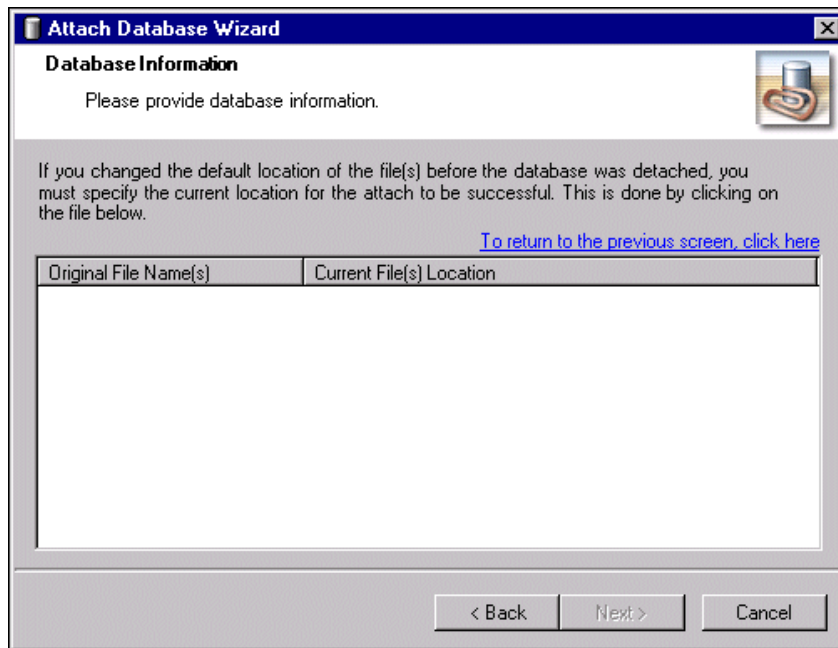
Name for existing database:  
DK\_Sample

Description for existing database: (optional)  
Sample data for in-house testing

< Back Next > Cancel

6. In the **Attach** field, select the type of **Raiser's Edge 7.7** database you want to attach: an **Existing database**, or if you have a backup of a 7.7 database that you want to attach, select **From backup file**.
7. In the **Path to existing database** field, enter the path to where the database you want to attach is located.
8. In the **Name for existing database** field, enter a name for the database.
9. In the **Description for existing database** field, enter a description of the database to help users identify the data contained in the database. For example, if this is sample data you use for in-house training, you can enter that information here.

10. If you have changed the default location of your existing database, click the **To adjust file location(s)** link (located on top of the **Path to existing database** field). The Database Information screen appears.



11. Specify the current location of the database by double-clicking the file.  
 12. Click the **To return to the previous screen** link to return to the Database Information screen.  
 13. Click **Next** to continue. The selected database is attached and a confirmation screen appears.



14. Click **Finish**.  
 When you return to the Blackbaud Management Console screen, the database you just attached appears under the product to which you attached it.  
 15. You can now open **The Raiser's Edge** and start working in the newly attached database.

## Converting on Machines with Dual Athlon Processors

If you run your database migration on a dual processor *Athlon* machine, the migration process may freeze. The resolution is to disable one of the processors during the migration and then enable it again after the migration is complete.

If you want to use only one processor of a multi-processor machine, use the `numproc boot.ini` switch.

1. Start a command session (Click **Start**, select **Run**, and enter `cmd.exe`).
  2. Go to the root of the C drive.
  3. Use the following command to modify the `boot.ini` file so it is not a system file, not hidden, and not read-only:  
`C:\> attrib boot.ini -r -s -h`
  4. Open the file in *Notepad*: `C:\> notepad boot.ini`
  5. Locate the entry that starts the operating system and add `/numproc=1` to the end. For example, the entry may look something like this:  
`multi(0)disk(0)rdisk(0)partition(1)\WINNT="Microsoft Windows 2000 Professional" /fastdetect /numproc=1.`
  6. Save the change and exit *Notepad*.
  7. Use the following command to reset the `boot.ini` attributes:  
`C:\> attrib boot.ini +r +s +h`
  8. Reboot the computer. The operating system detects and uses the first processor.
- You can now run the conversion program. After the conversion completes, you can change the settings back to enable both processors.

## Verifying Your Converted Data

Once the conversion process completes, we recommend you verify data has converted properly. In this section, we explain the steps you can take to determine the success of your data conversion.

### Checking Database Integrity

The Blackbaud Management Console enables you to easily check the integrity of your database. In addition to verifying that your data converted properly, we also recommend you run this utility before making any major changes to your system, such as hardware or software upgrades.

#### ► Checking database integrity

1. Confirm all users are logged out of the database.
2. Double click the Blackbaud Management Console icon on your desktop. The Blackbaud Management Console screen appears.

- From the Blackbaud Management Console screen, select the **Maintenance** category in the tree view of the products pane. The Maintenance screen appears in the right pane.



- In the **Check Integrity** frame in the right pane, click **Check**. A confirmation message appears.
- Click **Yes** to check your database. You return to the Blackbaud Management Console screen. The program tracks the progress of the database check at the top of this screen.

When the process is complete, details about the procedure appear at the top of the Blackbaud Management Console screen.



The word "Succeeded" appears next to the **Result** field.

- Click the "X" in the upper right corner to exit the Blackbaud Management Console.

## Creating Queries, Exports, and Crystal Reports in Version 7

Because queries, exports, and reports in your version 6.42 database do not convert to version 7, we explain how to create control reports for each in the Printing Control Reports for Queries, Exports, and Crystal Reports section of the *Conversion Planning Guide*. Using the control report information, you can now recreate the queries, exports, and *Crystal* reports you use on a regular basis in version 7.

## Printing Queries and Reports in Version 7

In the *Conversion Planning Guide*, we recommend you print several queries and reports to compare the information with the query and report output in version 7. Now, you can print these same queries and reports in version 7 and compare the results with the queries and reports you printed before converting.

## The Raiser's Edge 6 Post Conversion Utility

**Note:** Information in this guide is subject to change. Please visit our Web site at [www.blackbaud.com](http://www.blackbaud.com) to view the most current information before you begin planning your conversion to **The Raiser's Edge 7**. We recommend periodically visiting our Web site during your planning process to view updated requirements or additional conversion information.

After you validate the data in your version 7 database, you can use the Post-Conversion Utility to globally change the location of attributes, constituent codes, and other information in the version 7 database. Although you can continue to use attributes and constituent codes to add information to a constituent record, you now have the option of entering some of this information in corresponding fields in version 7. The Post-Conversion Utility guides you through the process of globally moving certain information to fields created specifically for this data. However, you are not required to move data to a new location.

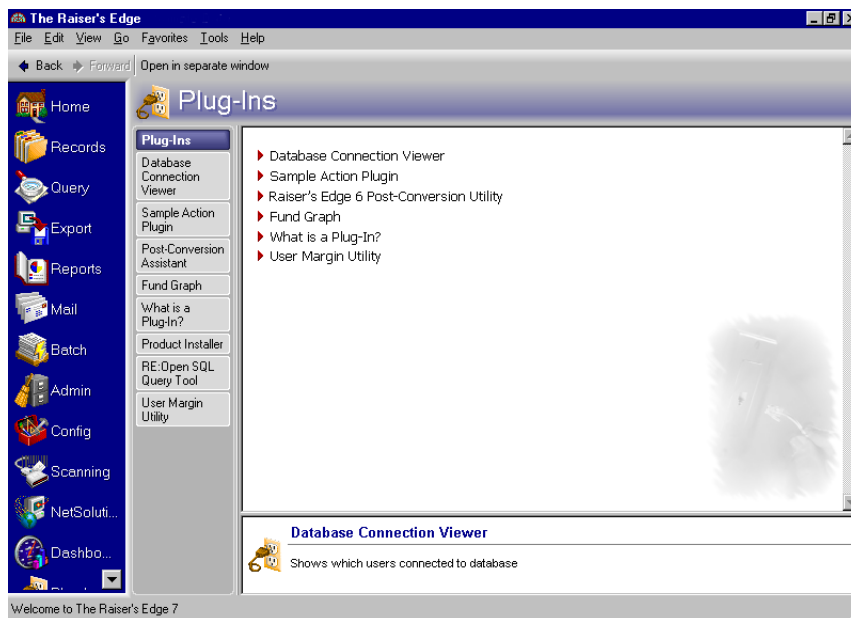
We recommend you complete each step in the Post-Conversion Utility and carefully review the summary of selected changes in Step 11 before applying the changes to your database. By reviewing the summary before applying global changes, you can make sure you include the proper information.

You can run the Post-Conversion Utility at any time. If you decide to move attributes, constituent codes, or other information at a later date, you can use the Post-Conversion Utility to make these changes. Once the changes are complete, you can print a control report or create queries containing the changed records. Before you run the Post-Conversion Utility, we suggest you back up your version 7 database.

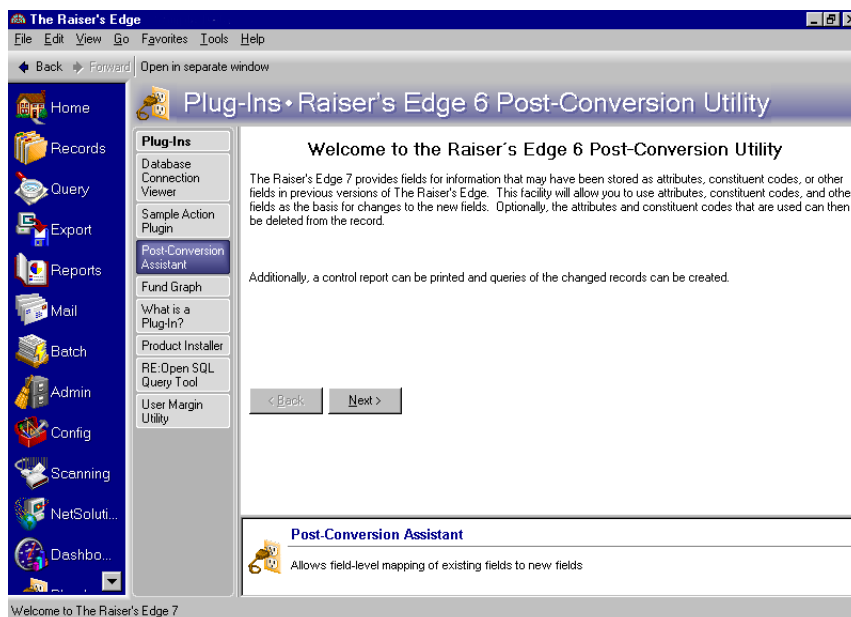
### ▶ Running the Raiser's Edge 6 Post Conversion Utility

**Warning:** Before you run the Post-Conversion Utility, we suggest you back up your version 7 database. You need a current copy of your data in case the conversion process is interrupted. Once you perform a backup of your data, do not make additions or changes to the backup files.

1. From the Raiser's Edge bar, select *Plug-Ins*. The Plug-Ins page appears.



2. Click **Raiser's Edge 6 Post Conversion Utility**. The Post-Conversion Utility Welcome screen appears.



3. Click **Next**. The following pages detail the steps to complete the utility.

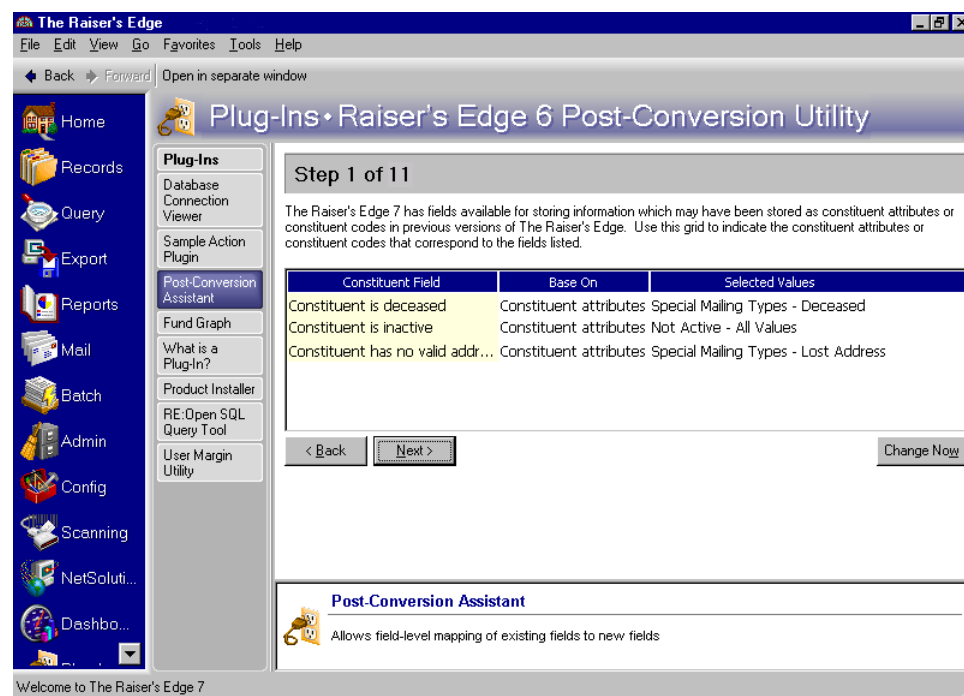
## Step 1: Deceased, Inactive, No Valid Address



You can click **Back** or **Next** to navigate the Post-Conversion Utility screens.



In the first step of the Post-Conversion Utility, you can move constituent attributes or constituent codes that indicate a constituent is deceased, inactive, or has no valid address to the corresponding fields in version 7.



**Warning:** We recommend you complete each step in the Post-Conversion Utility and review the summary information in Step 11 before clicking **Change Now**. When you click **Change Now**, the program applies all selections made from the global change screens. No changes are made to your database until you click **Change Now**.

**Constituent Field column.** The **Constituent Field** column lists the fields in version 7 to which you can move attributes or constituent codes with corresponding information. The available selections are Constituent is deceased, Constituent is inactive, and Constituent has no valid address. In version 7, the **Constituent is deceased** checkbox appears on the Bio 1 tab of the constituent record. The **Constituent is inactive** and the **Constituent has no valid address** checkboxes appear on both the Bio 1 tab and Org 1 tab of the constituent record.

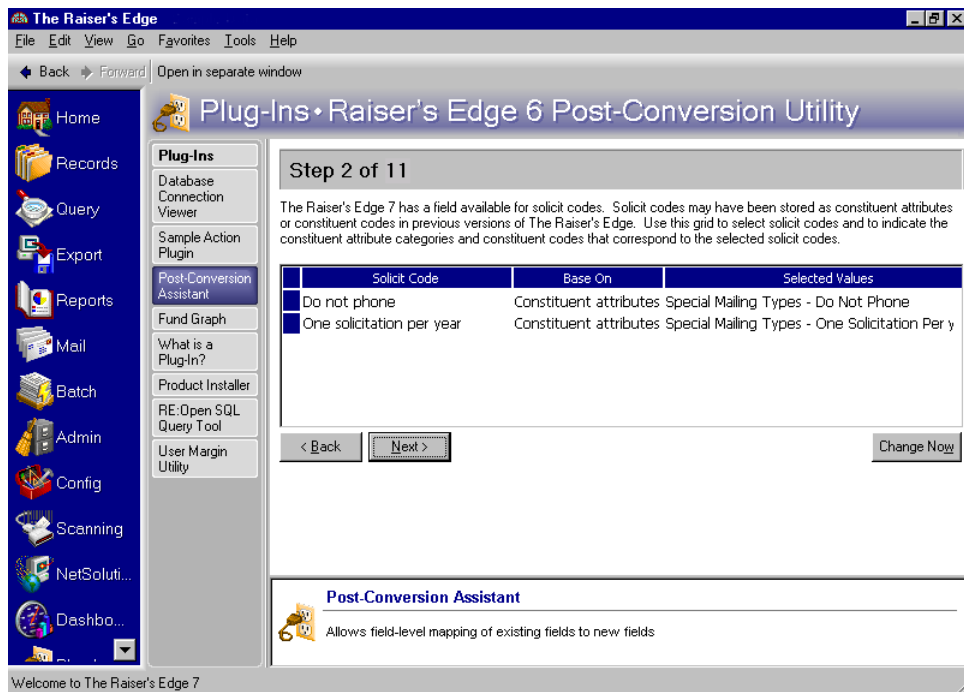
**Base On column.** In the **Base On** column, you can select the information on which to base the change. You can select <None>, Constituent attributes, or Constituent codes from the list. If you select <None>, no change occurs and the **Selected Values** column is disabled. If you select Constituent attributes, or Constituent codes, the **Selected Values** column is enabled. Your selection in the **Base On** column determines the values available in the **Selected Values** column. If you select Constituent attributes, only attributes are available in the **Selected Values** column. If you select Constituent codes, only constituent codes are available in the **Selected Values** column.

**Selected Values column.** From the **Selected Values** column, you can determine which attributes or constituent codes you created in version 6.42 correspond to the entry in the **Constituent Field** column. For example, your organization uses the attribute Not Active to indicate a constituent is no longer active in your organization. To move the attribute of Not Active to the corresponding field in version 7, you select Constituent attributes in the **Base On** column and Not Active from the attributes list in the **Selected Values** column. During the global change process, the attribute Not Active moves to the corresponding **Constituent is inactive** checkbox and that checkbox is marked.

## Step 2: Solicit Codes

**Note:** You can continue to use the attribute “Special Mailing Types” instead of converting this attribute to the **Solicit Code** field. In *Mail*, you can exclude records based on attributes. Therefore, having this information as an attribute in your database may make creating specific mailings easier.

From the Step 2 screen, you can select the attributes or constituent codes you want to base the information in the **Solicit Code** field on.



**Note:** You can click **Back** or **Next** to navigate the Post-Conversion Utility screens.

**Solicit Code column.** In the **Solicit Code** column, you can select each solicit code with a corresponding attribute or constituent code in your version 6.42 database. For example, you may have created an attribute of One solicitation annually. This attribute remains on the records of these constituents after the conversion. Because version 7 has a **Solicit Code** field on the Bio 1 or Org 1 tab of the constituent record, you may want to move this attribute to the **Solicit Code** field.

**Base On column.** In the **Base On** column, you can select the information on which to base the change. You can select <None>, Constituent attributes, or Constituent codes from the list. If you select <None>, no change occurs and the Selected Values column is disabled. If you select Constituent attributes or Constituent codes, the **Selected Values** column is enabled. Your selection in the **Base On** column determines the values available in the **Selected Values** column. If you select Constituent attributes, only attributes are available in the **Selected Values** column. If you select Constituent codes you can search for constituent codes used to define constituent solicit preference.

**Warning:** We recommend you complete each step in the Post-Conversion Utility and review the summary information in Step 11 before clicking **Change Now**. When you click **Change Now**, the program applies all selections made from the global change screens. No changes are made to your database until you click **Change Now**.

**Selected Values column.** From the **Selected Values** column, you can determine which attributes or codes you created in version 6.42 correspond to the entry in the **Constituent Field** column. For example, your organization may use an attribute One solicitation per year to indicate a constituent should be asked to contribute to your organization only once each year. To move the attribute of One solicitation per year to the corresponding table entry in version 7, you select Constituent attributes in the **Base On** column and One solicitation per year from the attributes list in the **Selected Values** column. During the global change process, the attribute One solicitation per year moves to the corresponding **Solicit Code** field on the Bio 1 or Org 1 tab of the constituent record.

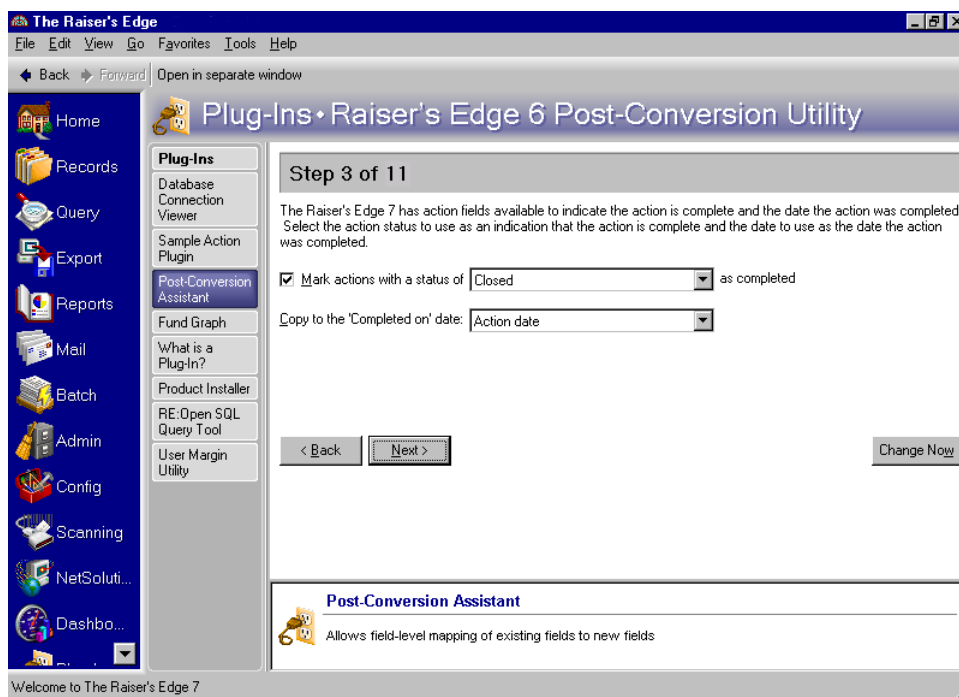
## Step 3: Completed Actions

In Step 3, you can determine which actions are marked as completed and you can select the date to use as the completion date. In version 6.42, you use the selections in the **Status** field on the action record to show whether or not an action was completed. For example, to indicate that an action, such as a phone call, a lunch meeting, or a letter has been completed, you select Closed in the **Status** field.

**Note:** You can click **Back** or **Next** to navigate the Post-Conversion Utility screens.

The action record in version 7 contains an **Action completed on** checkbox and date field. Because the action record in version 6.42 does not have fields that correspond to the **Action completed on** checkbox and date field in version 7, you must use the information in the **Status** field to determine whether or not to mark the **Action completed on** checkbox.

In Step 3 of the Post-Conversion Utility, you can select the action status used to indicate the completion of an action in version 6.42 to globally mark the **Action completed on** checkbox in version 7. Then, you can determine the date to appear in the **Action completed on** date field by selecting the date on the action record, the date the action record was last changed, or the current date.



**Mark actions with a status of checkbox.** Mark this checkbox to enable the status and date fields. If you mark this checkbox, you must select an action status in the **Mark actions with a status of** field and a date in the **Copy to the 'Completed' on date field**.

**Mark actions with a status of field.** You can select the action status you want to mark as completed. In version 7, you can mark the **Action completed on** checkbox and enter a completion date. Because no fields in version 6.42 correspond to the completion checkbox and date field, you can base the completion information on the action status and you can select a date to use as the completion date. For example, if you want all actions with a status of Closed to be marked as completed in version 7, you can select Closed in the **Mark actions with a status of** field on this screen.

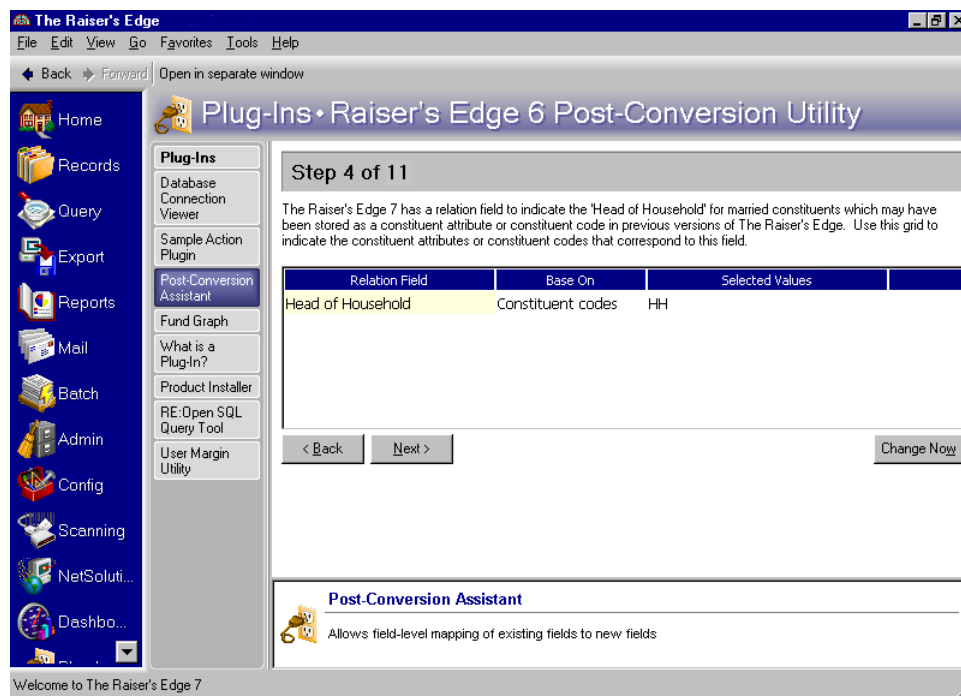
**Warning:** We recommend you complete each step in the Post-Conversion Utility and review the summary information in Step 11 before clicking **Change Now**. When you click **Change Now**, the program applies all selections made from the global change screens. No changes are made to your database until you click **Change Now**.

**Copy to the 'Completed' on date field.** Once you select an action status to define as completed in version 7, you can select a date to appear in the completion date field. The available selections are Action date, Last changed date, or Today's date. If you have additional date attributes defined for actions, these attributes also appear in the selections. If you select Action date, the date entered in the **Action Date** field of the action record appears as the completion date in version 7. Last changed date uses the most recent date a change occurred to the record. If you select Today's date, the current date appears in the date field. For action date attributes, the date type defined for the action attribute appears as the completion date.

## Step 4: Head of Household

For constituents in your database who share the same address, you may have created a Head of Household attribute or constituent code in version 6.42 to designate the head of household. By specifying a head of household, you can determine which individual is the primary constituent. For example, Mary Jacobs and her husband Mark are constituents in your database who share the same address. Mary is active in your organization and she donates several large gifts each year. Her husband Mark occasionally volunteers for events. Because Mary is more involved and consistently contributes gifts to your organization, you want to make her the head of household.

In version 7, you can specify the head of household for constituents who share the same address by marking the **This individual is the “Head of Household”** checkbox on the spouse relationship record. In Step 4 of the Post-Conversion Utility, you can select the attribute or constituent code used to indicate that a constituent is the head of household in version 6.42 to mark the head of household checkbox for all qualifying constituents in version 7. You can only designate constituents in your database as a head of household. Spouses entered on the Spouse tab must have a constituent record to be marked as a head of household.



**Relation Field column.** The **Relation Field** column contains the entry Head of Household. This field appears as the **This individual is the “Head of Household”** checkbox on the Individual Relationship screen for a spouse in version 7. You can add a spouse to a constituent record from either the Bio 1 tab or the Relationship tab. The **This individual is the “Head of Household”** checkbox is available only if the individual relationship is a spouse and the spouse is also a constituent.

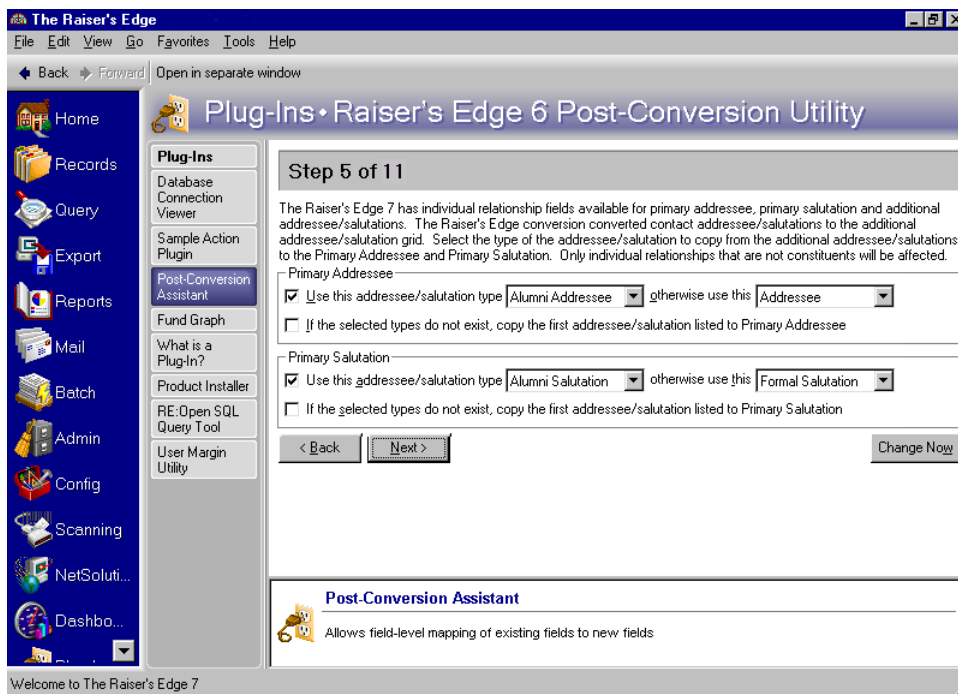
**Base On column.** In the **Base On** column, you can select information on which to base the change. You can select <None>, Constituent attributes, or Constituent codes from the list. If you select <None>, no change occurs and the **Selected Values** column is disabled. If you select Constituent attributes or Constituent codes, the **Selected Values** column is enabled. Your selection in the **Base On** column determines the values available in the **Selected Values** column. If you select Constituent attributes, only attributes are available in the **Selected Values** column.

**Warning:** We recommend you complete each step in the Post-Conversion Utility and review the summary information in Step 11 before clicking **Change Now**. When you click **Change Now**, the program applies all selections made from the global change screens. No changes are made to your database until you click **Change Now**.

**Selected Values column.** From the **Selected Values** column, you can determine which attributes or constituent codes you created in version 6.42 correspond to the entry in the **Relation Field** column. For example, your organization uses the constituent code of HH to indicate a constituent is the head of household. To move the constituent code to the corresponding field in version 7, you select Constituent code in the **Base On** column and HH from the constituent code list in the **Selected Values** column. During the global change process, the constituent code HH moves to the corresponding field — the **This individual is the “Head of Household”** checkbox — and the checkbox is marked. Click the binoculars in the **Selected Values** column to search for the attribute or constituent code used to define the head of household.

## Step 5: Primary Addressee and Primary Salutation

In version 6.42, you cannot specify a primary addressee and primary salutation for contacts in your database who are not constituents. In version 7, you can select a primary addressee and a primary salutation for contacts who are not constituents in your database, and you can enter additional addressee/salutations for these individuals. For example, in your version 6.42 database, Robert Jackson is a contact for the organization Jackson & Wright. Robert's contact record has the addressee type Contact Addressee (Mr. Robert Jackson) and Contact Salutation (Mr. Jackson). In Step 5 of the Post-Conversion Utility, you can copy the Contact Addressee and Contact Salutation formats to the **Primary Addressee** and **Primary Salutation** fields in version 7. If your first and second addressee and salutation selections are not available, you can select to copy the first available addressee and salutation to the **Primary Addressee** and **Primary Salutation** fields in version 7.



**Primary Addressee frame.** You can enter information to specify the format to appear in the **Primary Addressee** field for contacts.

**Use this addressee/salutation type field... otherwise use this field.** You can select the addressee/salutation type to appear in the **Primary Addressee** field for contacts in your database. If the first addressee/salutation type you choose is not available, the program copies your second selection to the **Primary Addressee** field. If your second choice is not available, the program copies the first addressee/salutation listed in the grid to the **Primary Addressee** field. For example, if you mark this checkbox and select Contact Salutation for your first choice and Formal Salutation for your second choice, the program searches all contact records for these addressee/salutation formats. If the format Contact Addressee does not appear on the contact record, then the program copies Formal Addressee to the **Primary Addressee** field.

**If the selected types do not exist, copy the first addressee/salutation listed to Primary Addressee checkbox.** Mark this checkbox so a primary addressee appears on the relationship record. If your first and second addressee/salutation type selections do not appear in the address and salutation grid on the relationship record, the program copies the first address/salutation type listed on the contact record to the **Primary Addressee** field.

**Primary Salutation frame.** You can enter information to specify the format to appear in the **Primary Salutation** field for contacts.

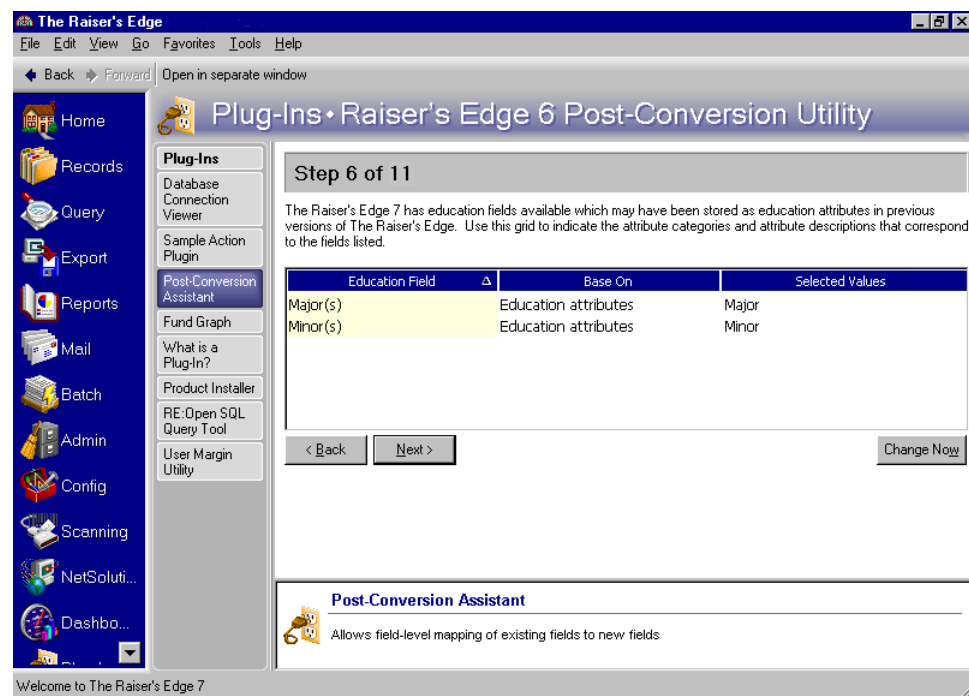
**Warning:** We recommend you complete each step in the Post-Conversion Utility and review the summary information in Step 11 before clicking **Change Now**. When you click **Change Now**, the program applies all selections made from the global change screens. No changes are made to your database until you click **Change Now**.

**Use this addressee/salutation type field...otherwise use this field.** You can select the addressee/salutation type to appear in the **Primary Salutation** field for contacts in your database. If the first addressee/salutation type you choose is not available, the program copies your second selection to the **Primary Salutation** field. If your second choice is not available, the program copies the first addressee/salutation listed in the grid to the **Primary Salutation** field. For example, if you mark this checkbox and select Contact Addressee for your first choice and Formal Addressee for your second choice, the program searches all contact records for these addressee/salutation formats. If the format Contact Salutation does not appear on the contact record, then the program copies Formal Salutation to the **Primary Salutation** field.

**If the selected types do not exist, copy the first addressee/salutation listed to Primary Salutation checkbox.** Mark this checkbox so a primary salutation appears on the contact record. If neither your first nor second addressee/salutation type selections appear in the address and salutation grid on the relationship record, the program copies the first addressee/salutation type listed in the grid to the **Primary Salutation** field.

## Step 6: Education Attributes

In version 6.42 you may have created education attributes to track constituent majors and minors. In Step 6, you can move these attributes to the new **Major** and **Minor** grids on the constituent Education record School tab.



**Education Field column.** The **Education Field** column lists the fields in version 7 to which you can move attributes with corresponding information. The available fields are **Major(s)** and **Minor(s)**. The **Major** and **Minor** grids in version 7 appear on the School tab of the education record. You can access information for the primary education record by clicking the **Education** button on the Bio 1 tab of the constituent record. To view additional education records for the constituent, select **Education/Schools** on the constituent record Relationships tab.



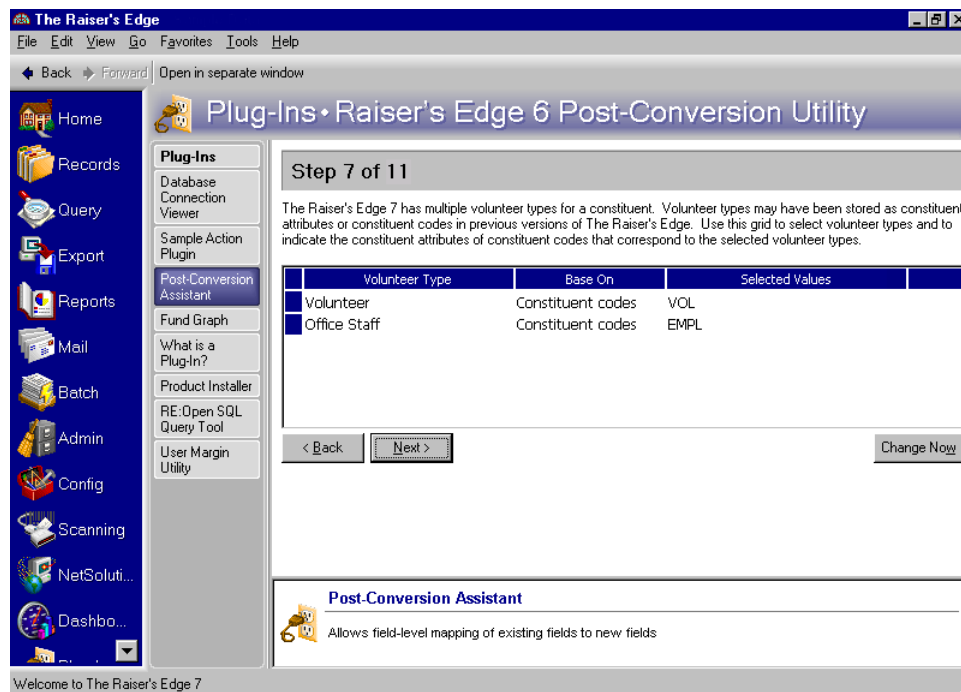
**Base On column.** In the **Base On** column, you can select the information on which to base the change. You can select <None> or Education attributes from the list. If you select <None>, no change occurs and the **Selected Values** column is disabled. If you select Education attributes, the **Selected Values** column is enabled and you can select a corresponding attribute.

**Warning:** We recommend you complete each step in the Post-Conversion Utility and review the summary information in Step 11 before clicking **Change Now**. When you click **Change Now**, the program applies all selections made from the global change screens. No changes are made to your database until you click **Change Now**.

**Selected Values column.** From the **Selected Values** column, you can determine which attributes you created in version 6.42 correspond to the entry in the **Education Field** column. The education attributes grid in 6.42 consists of three columns: **Category**, **Description**, and **Comments**. Perhaps your organization uses Major as an attribute category. You can select a field of study in the **Description** column and you can enter any additional information in the **Comments** column. To move the attribute of Major to the corresponding grid in version 7, you select Education attributes in the **Base On** column and Major from the attributes list in the **Selected Values** column. During the global change process, the attribute Major and description move to the corresponding grid in version 7. Comments are not converted however and do not move to the grid in version 7.

## Step 7: Volunteer Module

If you have the optional module *Volunteer Management*, you can select the attributes or constituent codes your organization uses to define volunteer types and move this information to the **Volunteer Types** grid in version 7. For example, in version 6.42, you may have created an attribute category of Volunteer with attribute descriptions of Phonathon, Gift Shop, and Information Desk to indicate the different types of volunteers your organization uses. In version 7, you enter Phonathon, Gift Shop, and Information Desk in the **Volunteer Types** grid on the Volunteer tab of the constituent record.





**Volunteer Type column.** The **Volunteer Type** column lists the entries available in the **Volunteer Types** grid in version 7. By selecting the corresponding attributes or constituent codes you used in version 6.42 in the **Base On** column, you can move this information to the **Type** column of the **Volunteer Types** grid in version 7. You can select the same entry in the **Volunteer Type** column more than once. If you want to select a volunteer type not listed in this column, you can add a new volunteer type. In version 7, the **Volunteer Types** grid appears on the Volunteer tab of the constituent record.

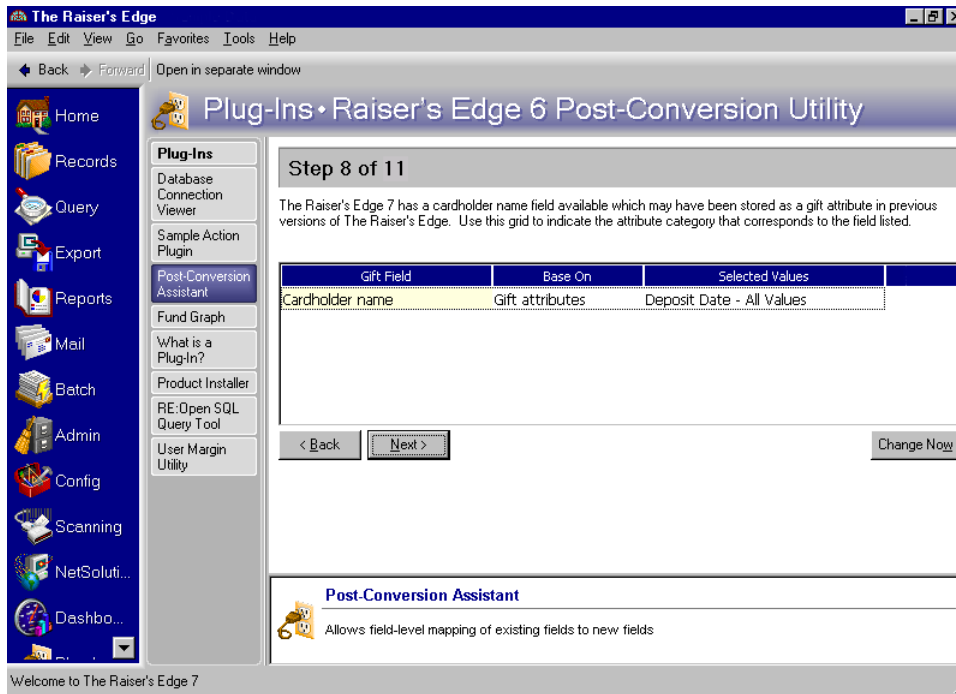
**Base On column.** In the **Base On** column, you can select the information on which to base the change. You can select <None>, Constituent attributes, or Constituent codes from the list. If you select <None>, no change occurs and the **Selected Values** column is disabled. If you select Constituent attributes or Constituent codes, the **Selected Values** column is enabled. Your selection in the **Base On** column determines the values available in the **Selected Values** column. If you select Constituent attributes, only attributes are available in the **Selected Values** column. If you select Constituent codes, you can search for constituent codes used to define all constituents' solicit preferences.

**Warning:** We recommend you complete each step in the Post-Conversion Utility and review the summary information in Step 11 before clicking **Change Now**. When you click **Change Now**, the program applies all selections made from the global change screens. No changes are made to your database until you click **Change Now**.

**Selected Values column.** From the **Selected Values** column, you can determine which attributes or constituent codes you created in version 6.42 correspond to the entry in the **Volunteer Type** column. For example, your organization uses the constituent code PVOL to indicate a constituent is a phonathon volunteer for your organization. To move the constituent code of PVOL to the **Volunteer Types** grid in version 7, you select Constituent codes in the **Base On** column and PVOL from the constituent codes list in the **Selected Values** column. During the global change process, the constituent code PVOL moves to the corresponding **Volunteer Types** grid on the Volunteer tab of the constituent record. You can select a value for each volunteer type used by your organization in version 6.4x.

## Step 8: Gift Record Cardholder Name

**The Raiser's Edge 7** includes a **Cardholder name** field on the gift record when a payment method of credit card is selected. If you stored this information as an attribute in version 6.4x, in Step 8 you can indicate which version 6.4x attribute category corresponds with the **Cardholder name** field.



**Gift Field column.** The **Gift Field** column displays the **Cardholder name** field. By selecting the corresponding attribute you used in version 6.42 in the **Selected Values** column, you can move this information to the **Cardholder name** field in version 7.

**Warning:** We recommend you complete each step in the Post-Conversion Utility and review the summary information in Step 11 before clicking **Change Now**. When you click **Change Now**, the program applies all selections made from the global change screens. No changes are made to your database until you click **Change Now**.

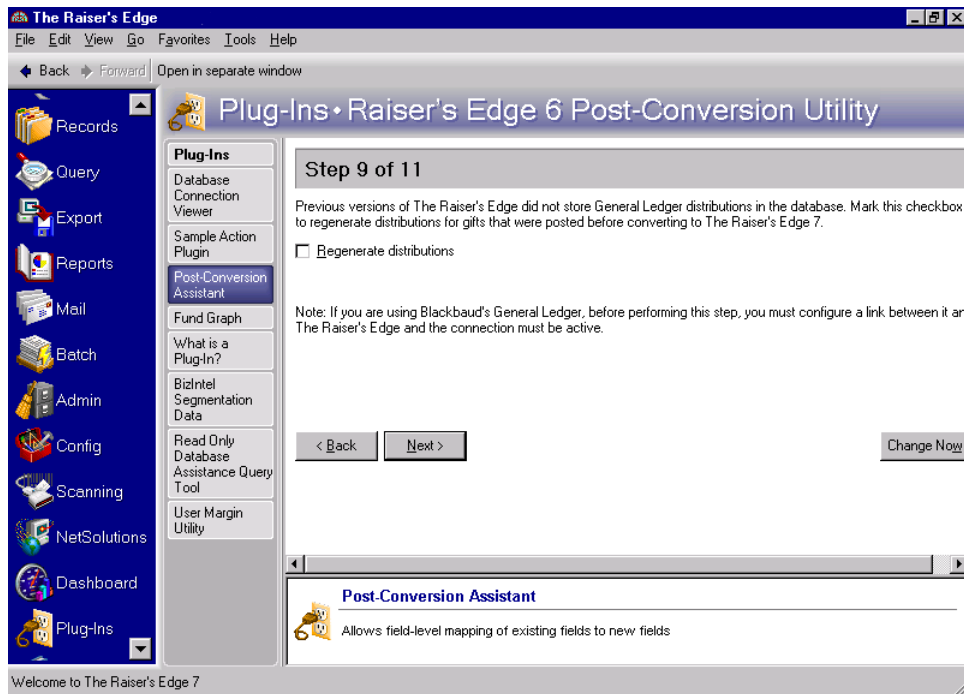
**Base On column.** In the **Base On** column, you can select the information on which to base the change. You can select <None> or Gift attributes. If you select <None>, no change occurs and the **Selected Values** column is disabled. If you select Gift attributes, attributes are available in the **Selected Values** columns.

**Selected Values column.** From the **Selected Values** column, you can determine which attribute you created in version 6.42 corresponds to the **Cardholder name** entry in the **Gift Field** column. To move an attribute to the **Cardholder name** field in version 7, you select an attribute in the **Selected Values** column. During the global change process, the attribute moves to the **Cardholder name** field on gift record.

## Step 9: Regenerate Distributions

**Warning:** We recommend you complete each step in the Post-Conversion Utility and review the summary information in Step 11 before clicking **Change Now**. When you click **Change Now**, the program applies all selections made from the global change screens. No changes are made to your database until you click **Change Now**.

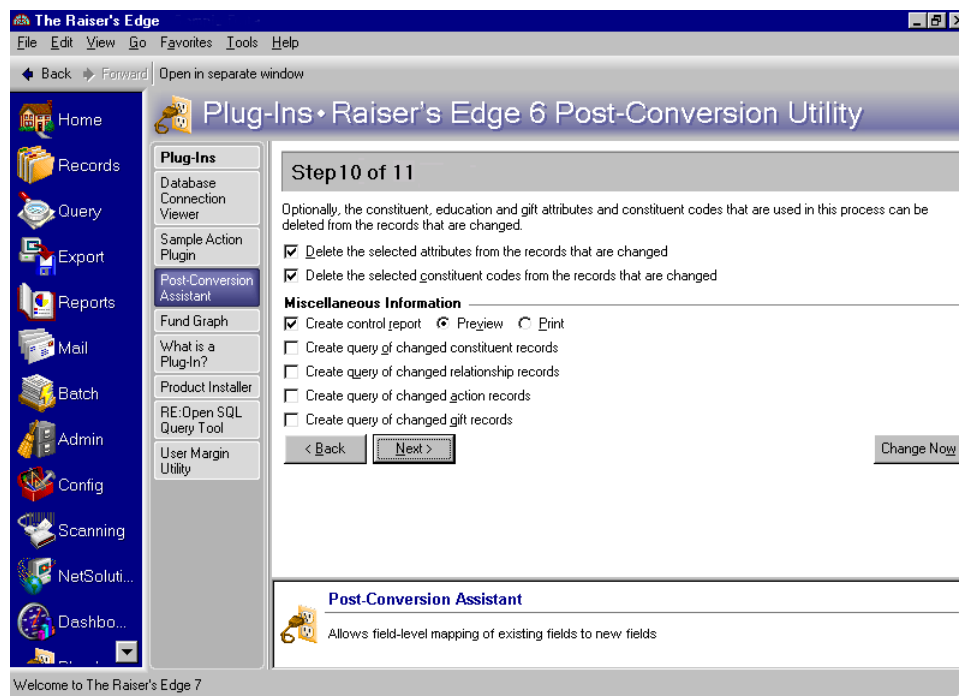
General Ledger gift distributions from version 6 do not automatically convert in version 7. In step 9, you can specify that distributions be regenerated for gifts that were previously posted in version 6. If you want to use features such as adjustments and reversals in version 7 for gifts that were posted in version 6, mark the **Regenerate distributions** checkbox. You do not need to mark the checkbox on this step unless you marked gifts as “posted” in version 6.



If you are using Blackbaud’s **General Ledger**, before performing this step, you must configure a link between it and **The Raiser’s Edge** and the connection must be active. For information about configuring a link between the two programs, see the General Ledger section of the Configuration chapter in the *Configuration & Security Guide*.

## Step 10: Data Processing

In Step 10, you can determine how the constituent and education attributes and constituent codes that were moved to new fields in version 7 should be processed. You can select to have the information remain as an attribute or constituent code on the constituent record, or you can delete this information. Deleting the selected attributes or constituent codes from the constituent record does not delete the table entry for the attribute or constituent code.



**Delete the selected attributes from the records that are changed checkbox.** Mark this checkbox to delete attributes you selected to move to corresponding fields in version 7. If you leave this checkbox unmarked, the information appears in two places on the constituent record: as an attribute and as a field value. The checkbox is enabled only if you select to move constituent attributes or education attributes to a corresponding field in version 7.

**Delete the selected constituent codes from the records that are changed checkbox.** Mark this checkbox to delete constituent codes you selected to move to corresponding fields in version 7. If you leave this checkbox unmarked, the information appears in two places on the constituent record: as a constituent code and as a field value. The checkbox is enabled only if you select to move constituent codes to a corresponding field in version 7.

**Miscellaneous Information frame.** From the **Miscellaneous Information** frame, you can select various ways to record the post-conversion global changes. We strongly recommend you mark all checkboxes in the **Miscellaneous Information** frame. You can use the control report and queries generated to verify the converted data in case you have questions concerning which attributes and constituent codes were changed.

**Create control report checkbox.** Mark the **Create control report** checkbox to generate a report of all global changes made once the Post-Conversion Utility has completed processing. You can mark the **Preview** option to preview the control report or you can mark the **Print** option to print a copy of the report. If you do not mark the **Create control report** checkbox, you can create a control report once the Post-Conversion Utility completes processing.

**Create query of changed constituent records checkbox.** Mark the **Create query of changed action records** checkbox to create a query of all action records that are globally changed once the Post-Conversion Utility completes processing. The checkbox is enabled if the **Completed** or the **Completed on** fields change. The query includes only constituent records with information entered in these fields.

**Create query of changed relationship records checkbox.** Mark the **Create query of changed relationship records** checkbox to create a query of all relationship records that are globally changed once the Post-Conversion Utility completes processing. The checkbox is enabled if one of the following fields changes: **Constituent is the “Head of Household”, Primary addressee, or Primary Salutation**. The query includes only constituent records with information entered in these fields.

**Warning:** We recommend you complete each step in the Post-Conversion Utility and review the summary information in Step 11 before clicking **Change Now**. When you click **Change Now**, the program applies all selections made from the global change screens. No changes are made to your database until you click **Change Now**.

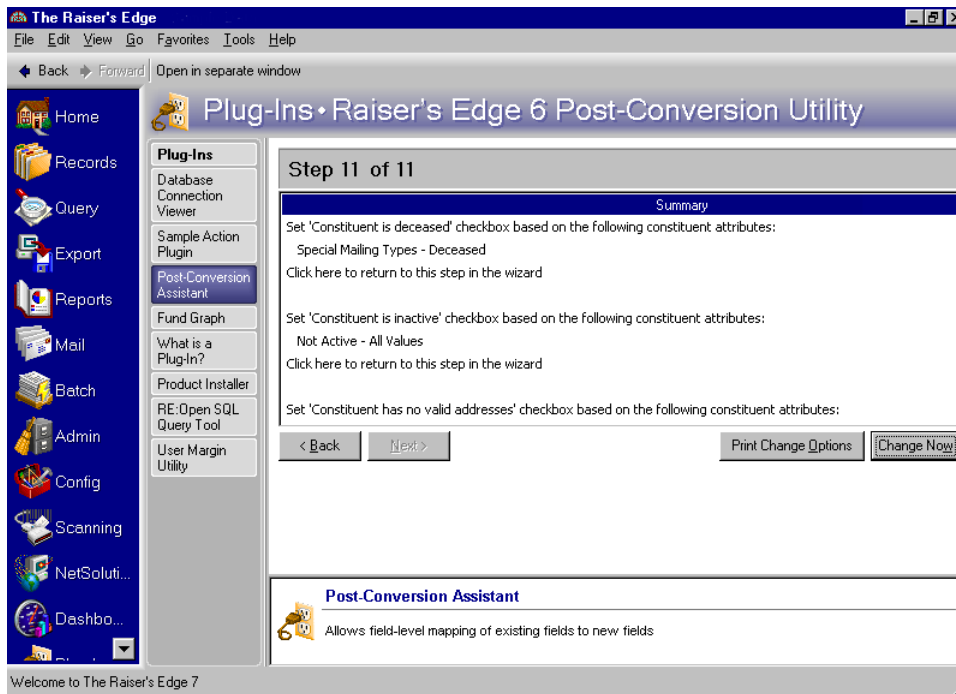
**Create query of changed action records checkbox.** Mark the **Create query of changed constituent records** checkbox to create a query of all constituent records that are globally changed once the Post-Conversion Utility completes processing. The checkbox is enabled if one of the following fields changes: **Constituent is deceased, Constituent is inactive, Constituent has no valid address, Solicit Code, Major, or Minor**. The query includes only constituent records with information entered in these fields.

**Create query of changed gift records checkbox.** Mark the **Create query of changed gift records** checkbox to create a query of all gift records that are globally changed once the Post-Conversion Utility completes processing. The checkbox is enabled if an attribute from version 6.4x is transferred to the **Cardholder name** field on the version 7 gift record. The query includes only gift records with information entered in this field.

## Step 11: Summary

**Warning:** We recommend you complete each step in the Post-Conversion Utility and review the summary information in Step 11 before clicking **Change Now**. When you click **Change Now**, the program applies all selections made from the global change screens. No changes are made to your database until you click **Change Now**.

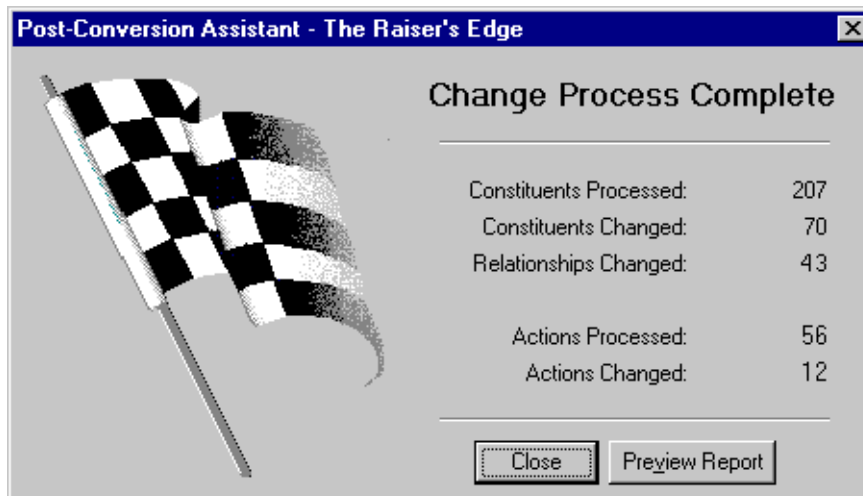
You can view each selection you made in the Post-Conversion Utility from the Summary screen. Click **Print Change Options** to print a control report of the global changes selected. Once you review the summary information, click **Change Now** to globally change the information you selected. For each query you selected to create from the Data Processing screen in Step 10, a Save Static Query As screen appears for you to enter query information.



## Post-Conversion Details Report

**Warning:** We recommend you back up your version 7 database once you complete the changes in the Post-Conversion Utility.

The Post-Conversion Details report provides conversion statistics. If you do not mark the **Create control report** checkbox in Step 10, you can click the **Preview Report** button on this screen to generate a control report.



**Constituents Processed display.** You can view the total number of constituents, both active and inactive, in the Constituents Processed display.

**Constituents Changed display.** The total number of constituents with changes to one of the following fields appears in the Constituents Changed display: **Constituent is deceased**, **Constituent is inactive**, **Constituent has no valid address**, **Solicit Code**, **Major**, or **Minor**.

**Relationships Changed display.** In the Relationships Changed display you can view the total number of relationship records with one of the following fields changed: **Constituent is the “Head of Household”**, **Primary addressee**, or **Primary Salutation**.

**Actions Processed display.** You can view the total number of actions in your database in the Actions Processed display.

**Actions Changed display.** The Actions Changed display presents the total number of records with the **Completed** field or the **Completed on** field changed.

## What To Do after a Successful Conversion

Once you have converted your database, verified the data, and organized the information in version 7 using the Post-Conversion Utility, you can further customize your database by entering information that did not convert. In the *Conversion Planning Guide*, we recommend steps to take before you convert so you can easily recreate settings in version 7. Now, you can enter this information in your version 7 database.

### Actions

Version 7 contains the new action field, **Category**. Because actions entered in version 6.42 convert as **Task/Other** category actions in version 7, you can now select the appropriate category for each converted action in your database.

**Note:** Information in this guide is subject to change. Please visit our Web site at [www.blackbaud.com](http://www.blackbaud.com) to view the most current information before you begin planning your conversion to *The Raiser’s Edge 7*. We recommend periodically visiting our Web site during your planning process to view updated requirements or additional conversion information.

The action type selected in the **Action Type** field in your version 6.42 database converts to the **Action type** field in version 7.

### Addresses

Type of Mail selections in version 6.x convert as attributes on the address Attributes tab in version 7. The attribute category is Special Mailing Info, and the description is the mail type. You may want to review this information on several records, or create a query to group records based on this attribute.

The preferred address in version 7 appears on the Bio 1 tab and is the address most commonly associated with the constituent. To determine the preferred address, the conversion searches each constituent’s addresses in this order: primary (Bio 1 tab), business, and spouse business. The first address marked as **All Mail** becomes the preferred address in version 7.

If none of the addresses are marked as **All Mail**, the first one marked to receive **Selected Mail** becomes the preferred address. If no addresses are marked as either **All Mail** or **Selected Mail**, the address on the Bio 1 tab in version 6.x becomes the preferred address in version 7.

**All Mail**, **Selected Mail**, and **No Mail** convert as follows.

- **All Mail:** The **Send mail to this address** checkbox is marked in version 7. This option is on the More screen for a selected address.

- **Selected Mail:** The **Send mail to this address** checkbox is marked in *The Raiser's Edge 7*. The Type of Mail selections in version 6.x convert as attributes on the address Attributes tab in version 7. The attribute category is Special Mailing Info, and the description is the mail type.
- **No Mail:** The **Send mail to this address** checkbox is unmarked in version 7.

## Alumni School/College Default

The school name you select in the **Alumni School/College** field on the General 1 tab in *Configuration* in version 6.42 does not convert to version 7. You can now enter a default school name in *Configuration*. From the Raiser's Edge bar, select *Config*. The Configuration page appears. From the Configuration page, click **Business Rules**. From the **Business Rules** tree view, select **Alumni options**. You can enter defaults for the class year format, school name, and constituent code.

## Credit Card Numbers

If you marked the **Validate Credit Card Numbers** checkbox on the Configuration Preferences tab in version 6.42, this setting does not convert to version 7. Once the conversion completes, you can select a Business Rule for credit card validation in *Configuration* in version 7. From the Configuration page, click the **Business Rules** link. From the **Business Rules** tree view, select **General**. You can mark one of the following **When saving a constituent or gift, if credit card number is invalid** options: **Do not allow record to be saved**, **Display warning**, or **Save record anyway**.

## Crystal Reports

*The Raiser's Edge 7* uses *Crystal Reports Standard 8.5*. The report formats in *Crystal Standard 8.5* are different from the *Crystal Reports* available in *The Raiser's Edge* version 6.42, so *Crystal Reports* do not convert to version 7. You can recreate your *Crystal Reports* using the information in the Export Control Report and the Crystal Report Definition report you printed in version 6.42.

**Note:** If you have *SQL Server Standard* or *Enterprise* edition and want to report directly from your *SQL Server* database, you can purchase *Crystal Reports Professional*. For more information about *Crystal* purchase options, email [solutions@blackbaud.com](mailto:solutions@blackbaud.com).

It is important to remember that because data exports differently from *The Raiser's Edge* version 7 than version 6.42, the formulas you used in *Crystal 6.0* may change when you recreate them for *Crystal Standard 8.5*. For example, the formula "if not isnull(City) then xxx" in *Crystal 6.0* does not work in *Crystal Standard 8.5* because of the way the data exports. For *The Raiser's Edge 7*, the equivalent formula is "if City <>= (is not blank)".

Additionally, before installing the 8.5 version of *Crystal Reports Standard*, you must uninstall any earlier versions of the software existing on your computer. For more information, contact Raiser's Edge Support at [resupport@blackbaud.com](mailto:resupport@blackbaud.com).

## Installing Crystal Reports

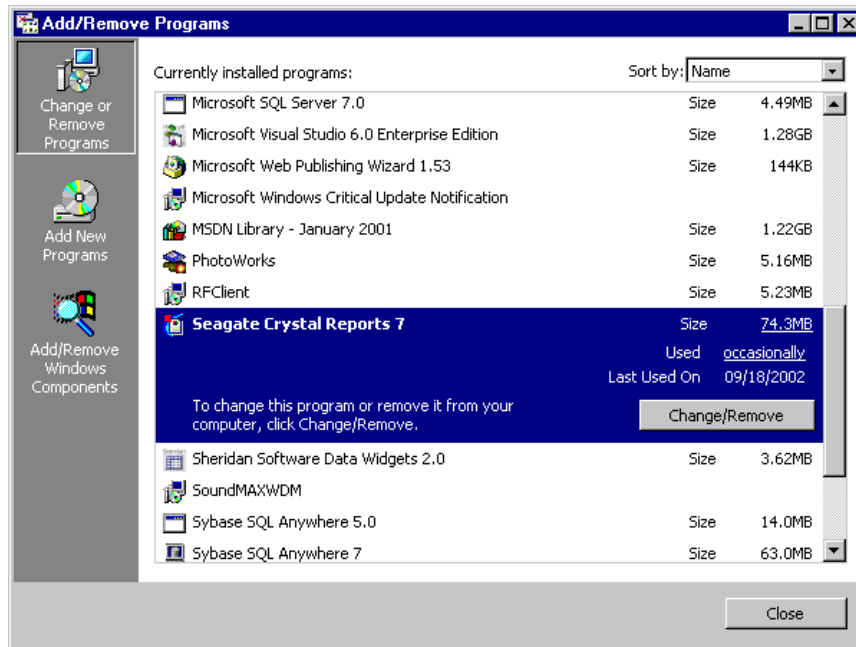
The *Raiser's Edge 7* supports *Crystal Reports 8.5*. The *Crystal Reports Standard* CD is included in your *Raiser's Edge 7* installation package. Before installing the 8.5 version of *Crystal Reports Standard*, you must uninstall any earlier versions of the software existing on your computer. The following two procedures take you step by step through first the uninstalling process and then the 8.5 installation process.

### ► Uninstalling Crystal Reports 7 (or lower)

**Note:** Before installing the 8.5 version of *Crystal Reports Standard*, you must uninstall any earlier versions of the software existing on your computer.

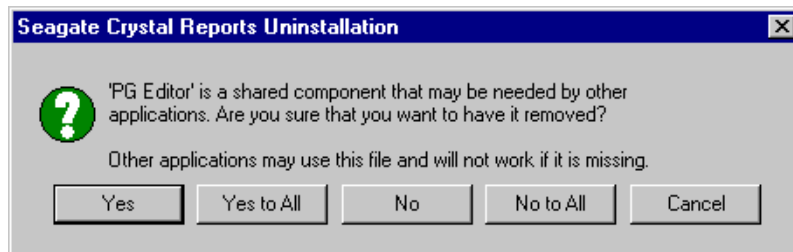


1. From the **Start** menu, select **Settings, Control Panel**. Select **Add/Remove Programs**. The Add/Remove Programs screen appears.
2. Locate and select Seagate Crystal Reports 7 (or lower).



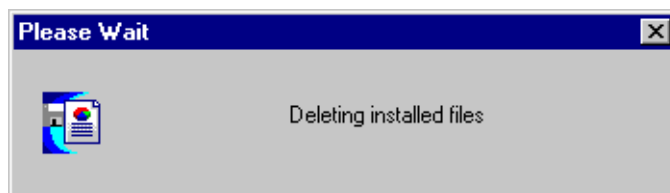
3. Click **Change/Remove**. A message appears, asking you to confirm you want this program removed.
4. Click **Yes**. The uninstall process begins.

You may receive messages asking if you want shared files removed.

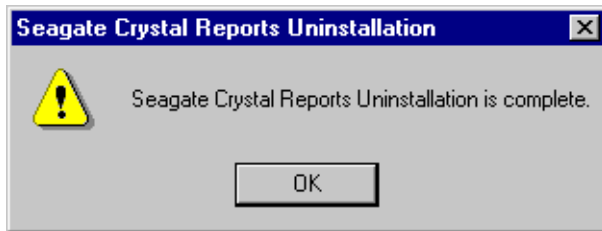


5. Even if the message suggests the file may no longer be needed, we recommend saying **No to All** and not uninstalling any shared files.

The deleting process continues.



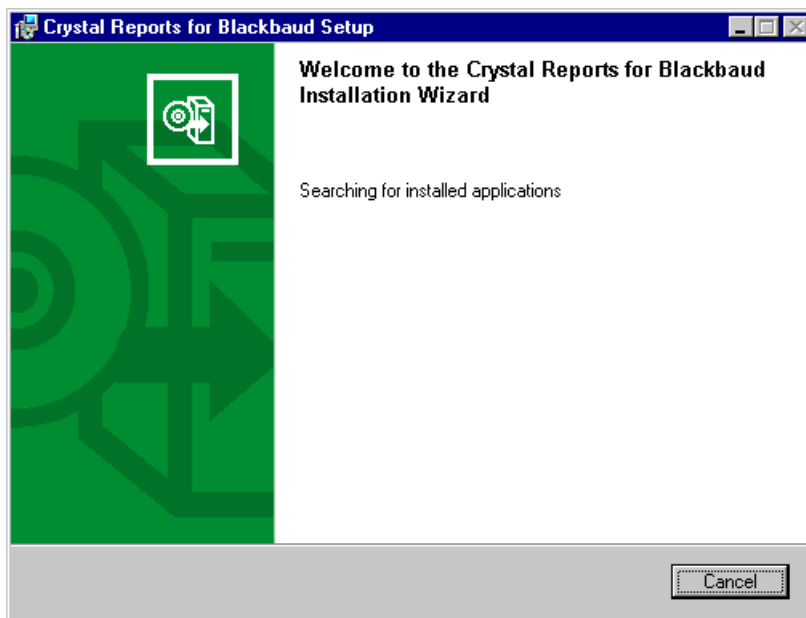
A message appears, telling you when the uninstall is complete.



6. Click **OK**. You return to the Add/Remove Programs screen.
7. To close the Add/Remove Programs screen, click **Close**.
8. You are now ready to install *Crystal Reports Standard 8.5*.

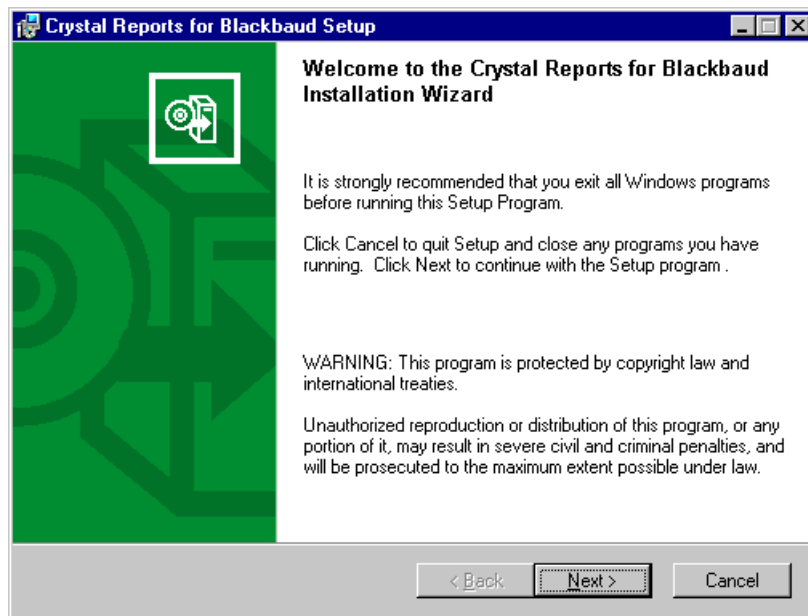
► **Installing Crystal Reports Standard 8.5**

1. Install the *Crystal Reports Standard* CD included with your **Raiser's Edge** update package. Set up should start automatically. If it does not, you can access the "setup.exe" from *Explorer*.
2. The program searches your computer, trying to locate any existing versions of *Crystal Reports*.

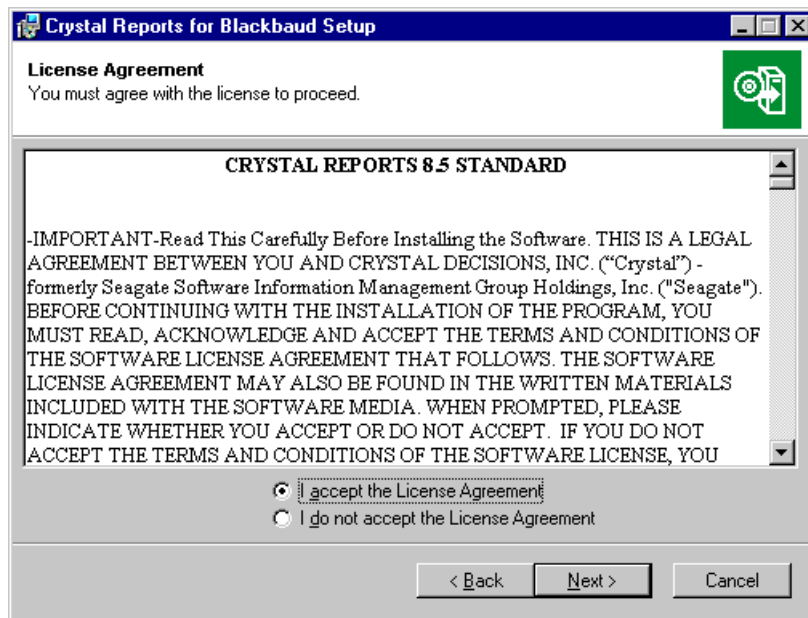


If an existing version is found, the program recommends exiting the setup procedure and uninstalling the older version.

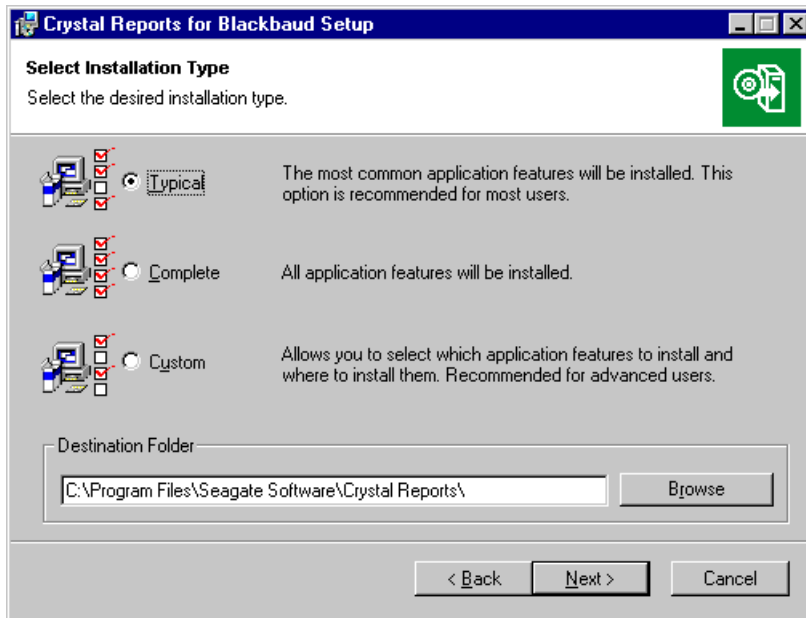
If no existing version is found, a screen appears welcoming you to the *Crystal Reports for Blackbaud* Installation Wizard.



3. Click **Next**. A screen appears displaying the License Agreement.



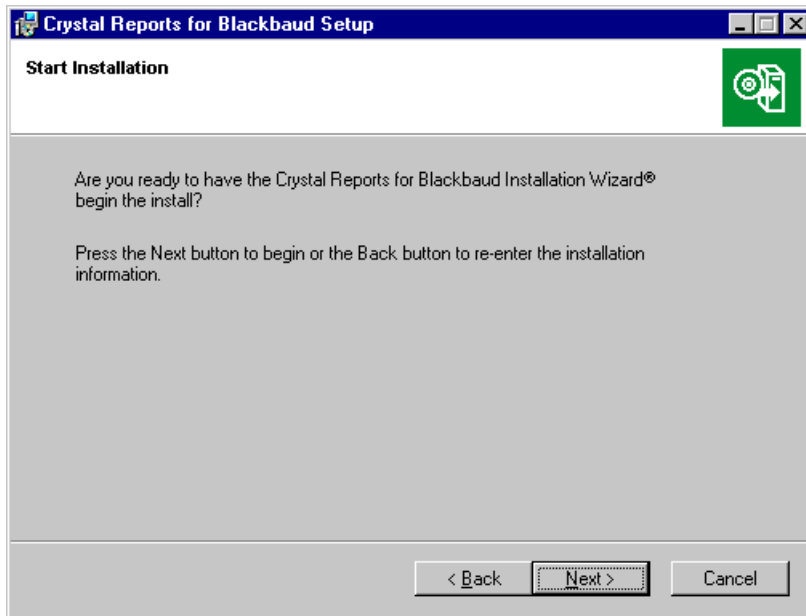
4. Select **I accept License Agreement** and click **Next**. A screen appears asking you to select an installation type.



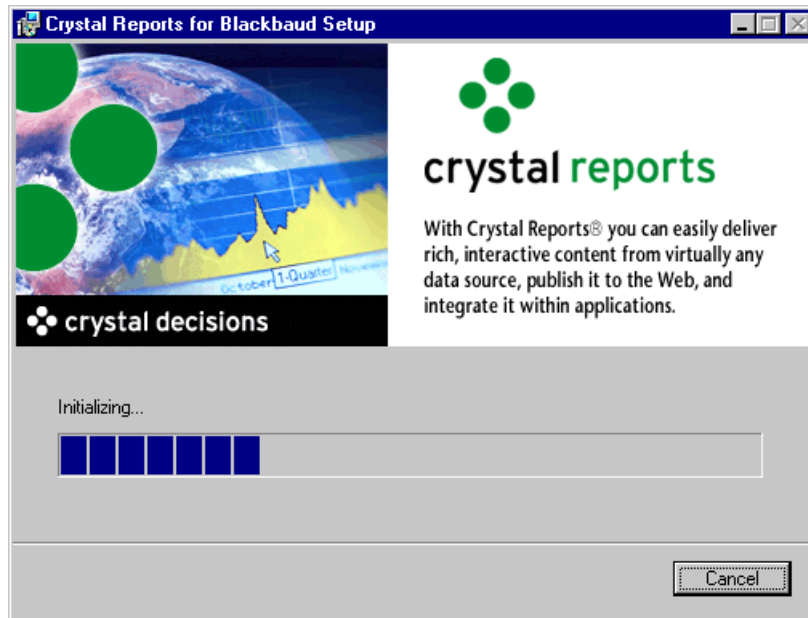
5. Because **Typical** is the easiest and most common type of installation, select **Typical**.

**Note:** For a detailed explanation of each installation type, see the *Crystal Reports* documentation, accessed from the company's Web site [www.crystaldecisions.com](http://www.crystaldecisions.com).

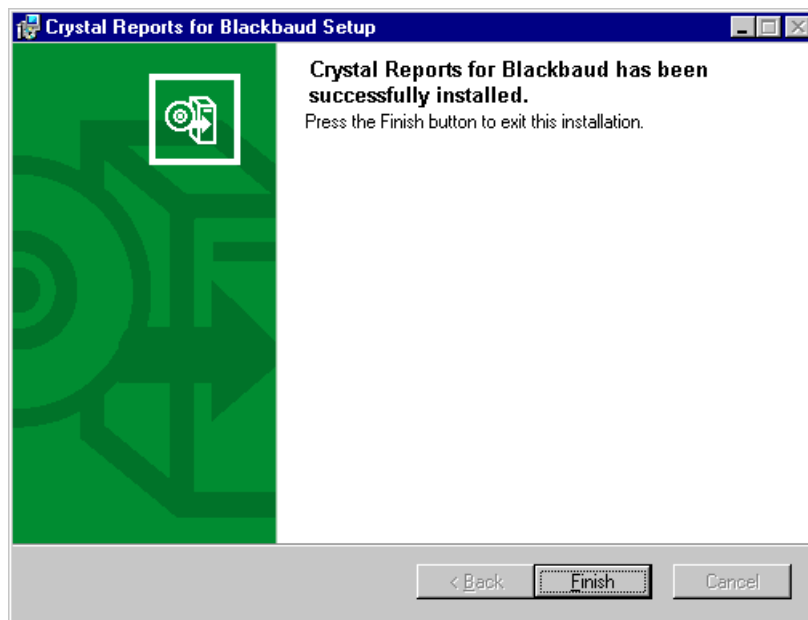
6. In the **Destination Folder** frame, enter where on your computer you want to install *Crystal Reports*. You can accept the default location, or click **Browse** to map to a new location.
7. Click **Next**. A screen appears, asking you to confirm you are ready to install *Crystal Reports*.



8. Click **Next**. The installation process begins. A screen appears, tracking the installation progress.



A screen appears, telling you when the installation process is complete.



9. Click **Finish**.
10. To open *Crystal Reports*, from the **Start** menu, click **Programs, Crystal Reports for Blackbaud**.

## Constituent Duplicate Criteria

If you change information in the **Individual Duplicate Criteria** grid and the **Organization Duplicate Criteria** grid in *Configuration* in version 6.42, the information does not convert to version 7. Instead, the system default settings appear in the grid. You can enter the duplicate criteria you wrote down before converting in the version 7 database. From the Configuration page, click the **Business Rules** link. From the **Business Rules** tree view, select **Criteria, Individuals**. Enter the duplicate criteria you want to use in duplicate searches for individuals. From the **Business Rules** tree view, select **Criteria, Organizations**. Enter the duplicate criteria you want to use in duplicate searches for organizations.

## Events

To avoid losing any information, all events entered in version 6.42 convert to the **Sporting event** category in version 7. Once the conversion completes, you can select the appropriate event type for each converted event: Sporting event, Dinner, Class, or Other.

## Field Characteristics

Fields defined as hidden or required in version 6.42 revert to the original settings in the conversion. Table lookup values convert, but you must mark the **Lookup** checkbox in *Configuration* in version 7 for the field values to display as a lookup table. Use the field settings you wrote down before converting to define fields in version 7 as hidden, required, or as table lookups. Renamed fields convert to the program-defined field name in version 7, so you can change the field name to the name you created in the earlier database version. Click the **Fields** link on the Configuration page to access field characteristics.

## Gift Types

The gift types of Cash, Stock/Property, Gift-in-Kind, and Other in version 6.42 convert directly to the **Gift type** field on the Gift tab of a gift record in version 7.

The gift type of Pledge converts directly from version 6.42 to version 7. For pledges with more than 999 installments, the 1000th installment and above do not convert. The sum of all installments for the 1000th installment and above are added to the 999th installment. This total is linked to the same fund that the 999th installment is for.

Gift distributions from version 6 do not automatically convert in version 7. To regenerate gift distributions, use the post-conversion utility. For more information, see “The Raiser’s Edge 6 Post Conversion Utility” on page 19.

## International Address Fields

In version 6.42, the database version determines the address fields available. For example, a US database contains address fields specific to the United States. All address fields for a specific version appear for international addresses in the database, even if the fields do not apply to the country selected.

**Note:** Information in this guide is subject to change. Please visit our Web site at [www.blackbaud.com](http://www.blackbaud.com) to view the most current information before you begin planning your conversion to **The Raiser’s Edge 7**. We recommend periodically visiting our Web site during your planning process to view updated requirements or additional conversion information.

For example, in the US version 6.42 database, the **County** field appears for a New Zealand address. New Zealand addresses do not contain counties, but the United States uses this format. Because the US version of the database contains a **County** field, a New Zealand address in the database also contains the field even though the address information does not apply to this country.

In version 7, address fields are specific to the country selected on the constituent record address screen. For example, in the US version 7 database, a constituent record with a New Zealand address has address fields that apply to New Zealand address formats. Information entered in address fields in version 6.42 that does not apply to the specific country converts as an address attribute.

Address fields converted as address attributes vary depending on the country associated with the database and the country selected on the constituent record address screen. Once you convert, you can view address attributes from the constituent record Bio 1 or Org 1 tab, **More** button, Attributes tab.

## Mail Merge Documents

A mail merge document combines text entered in a word processing application with fields from ***The Raiser's Edge 7***. In version 7, certain field names have changed and many new fields have been added. These changes affect merge documents during the conversion process. Now you can create new mail merges and replace the merge fields with the new fields in version 7.

In version 7, you can export information to a word processing application from *Mail* or *Export*. To create a mail merge document using a letter you previously created, open and save the letter with a new name. Create the export files you want to merge with the document text in *Mail* or *Export*. Attach the exported data as a merge file to the letter. Open the letter and replace the existing merge fields with the new version 7 merge fields.

You can automate mail merges in ***The Raiser's Edge 7*** from the **Letter** menu of a constituent record or from the **Letters** link of *Configuration*. Browse to a letter you previously created and select the version 7 fields you want to correspond to the merge fields in the document.

Microsoft *Word* versions 2000 and higher are tightly integrated with ***The Raiser's Edge*** version 7. This integration enables you to move seamlessly through the process of creating the data file in ***The Raiser's Edge***, creating the documents in *Word*, and automatically processing the mail merge to create your custom letters. For more information, see the Mail Merge with Microsoft Word chapter of the *Raiser's Edge & Microsoft Office Integration Guide*.

## Mailings

**Note:** Information in this guide is subject to change. Please visit our Web site at [www.blackbaud.com](http://www.blackbaud.com) to view the most current information before you begin planning your conversion to ***The Raiser's Edge 7***. We recommend periodically visiting our Web site during your planning process to view updated requirements or additional conversion information.

You determine the information to include in mailings by applying parameters. Parameters are filters, fields, options, or checkboxes that limit the information included in mailing functions. The parameters you define in version 6.42 do not convert to version 7. Use the parameter information you wrote down before converting to enter parameter files for your organization's mailings in version 7.

## Membership Card Name Default

The membership card name default you select in version 6.42 does not convert to version 7. Now the conversion is complete, you can select a membership card name default for version 7. From the Configuration page, click the **Business Rules** link. From the **Business Rules** tree view, select **Name display, Membership**. From the **Default Membership Card Addressee/Salutation** frame, mark **Use addressee from Configuration** and select the appropriate default name format from the **Use addressee from Configuration** field.

## Membership Gift Defaults

The fund defaults for membership categories do not convert to version 7. In version 7, you can enter gift defaults for memberships linked to gifts, including a default fund. From the Configuration page, click the **Membership Categories** link. Open a membership category and select the Default Settings tab. Click **Gift Defaults** to view the default sets available. Open the appropriate default set and enter a default fund for the gift in the **Fund** field.

## Point of Sale

*Point of Sale 7* has several new features, including an option in the Update the Raiser's Edge wizard that updates email addresses and phone numbers from *Microsoft Retail Management System* to **The Raisers's Edge 7**, and the ability to add new customers created in *Microsoft Retail Management System* as constituents in **The Raiser's Edge**.

You must upgrade to *Microsoft Retail Management System* (formerly called *QuickSell Commerce*) before you can use *Point of Sale 7*. You can perform the upgrade before or after you install *Point of Sale 7*. For more information about *Point of Sale* in version 7 and upgrading *Microsoft Retail Management System*, see the *Point of Sale Guide*.

## Profiles

Profiles you create in version 6.42 do not convert to version 7. Use the Profiles you printed before converting to recreate your Profiles in version 7. In version 7, you access Profiles from *Reports*.

## Queries and Exports

Version 7 includes new fields, and you can enter or select more than one value in certain fields. Because the results of queries and exports are based specifically on field criteria, queries and exports do not convert. Use the Query Control Report and the Export Control Reports you created in version 6.42 to recreate your queries and exports in version 7.

## Relationship Education Information

In version 7, converted Alumni Information for relationships appears on a relationship record and **School name** is a required field. If a school name was not entered on the *Configuration* General tab in version 6.42, the school name for the relationship education record in version 7 appears as Conversion None. You can enter the appropriate school name in the **School name** field for each of these records.

## Reports

**Note:** The links between the database and reports available in the program have changed in version 7, so you cannot make changes to .rpt files for canned reports.

You determine the information to include in reports by applying parameters. Parameters are filters, fields, options, or checkboxes that limit the information included in reports. The parameters you define in version 6.42 do not convert to version 7. Use the parameter information you wrote down before converting to create report parameter files in version 7.



## Samples

*The Raiser's Edge* includes samples of actual working queries, exports, reports, custom views, business rules, and letters you can use with your live database. When upgrading to *The Raiser's Edge 7.x* from a previous *Raiser's Edge 7* version, samples of new functions in *The Raiser's Edge* are automatically installed to your database during the upgrade. To install samples for functions that existed prior to this version, such as queries and exports, you must use the Sample Installer. You can also use the Sample Installer to view all your currently installed samples. To access the Sample Installer, from the shell menu bar, select **Tools, Install Samples**. For a new installation of *The Raiser's Edge 7*, all samples are automatically installed.

## School Name Table

In version 6.42, the lookup table value selected in the **School Name** field on the education record has only a long description. In version 7, you can select either a long or short description for school name lookup table values. From the User Options General tab, select the default description for the **School Name** table in version 7.

## Security Groups

Although your security groups in version 6.42 convert to version 7, you must reestablish the rights for each group. Use the security information you wrote down before converting to establish rights for each security group in version 7. You can access the **Security** link from *Administration*.

For individuals who are members of multiple security groups, access to specific information in version 7 is based on the most restrictive group privileges. For example, you add Anne Sinclair as a member of two security groups in version 7. As a member of Group A, Anne is not restricted from viewing any notepad types. However, as a member of Group B, Anne cannot view Director's Notes. Although Anne has permission to view Director's Notes as member of Group A, she can never have access to this notepad type because as a member of Group B, her access to Director's Notes is restricted. Therefore, whenever an individual is a member of more than one security group and different privileges are defined for each of these groups, the most restrictive group privilege applies.

Because field level changes and changes to the database structure in version 7 affect certain security options you selected in version 6.42, you must consider these changes when you recreate your organization's security groups. For more information about security groups, see the Security chapter of the *Configuration & Security Guide*.

## Soft Credit Spouses

For relationships who are also constituents in your database in version 7, you can globally mark the **Automatically soft credit this individual for gifts** checkbox on the constituent record Spouse screen if you have the proper security rights. To globally mark the **Automatically soft credit this individual for gifts** checkbox, create a query of these relationship records. From *Administration*, click the **Globally Change Records** link. From the **Constituent** entry in the records tree view, highlight **Individual/Contact/Employee Relationship** and select **New Change** from the toolbar. From the Global Change screen, click **Include** to search for the query of relationships you created. From the **Available Fields** frame, select **Automatically Soft credit gifts**. From the Edit Change Parameters screen, select Add in the **Operation** field and select Checked in the **Add** field. For more information about globally changing records, see the Globally Change Records chapter of the *Global Add, Delete, & Change Guide*.

## Tables

The table sort order you select in version 6.42 does not convert to version 7. You can use the Code Tables you printed before converting to enter the sort order for tables in version 7. We recommend you check the values in each table once you convert to make sure the table values in version 7 match the table values entered in version 6.42.

## User Defaults

You can enter the version 6.42 default value settings you wrote down before converting and enter these default values in your database. In version 7, you can create groups of related default settings called default sets. By defining default sets, you can increase the speed of data entry. To create default sets, select **Tools, Organize/Create Defaults** from the menu bar in version 7.

## User Options

The workstation-based Preferences you set up in version 6.42 are password-based User Options in version 7. Use the list of Preferences you wrote down before converting to enter this information as User Options. To access User Options, select **Tools, User Options** from the menu bar.

## Post-Conversion Checklist

Once you complete the conversion process, read the following post-conversion checklist items and mark each item in the list once you complete the task.

- ☐ Select an appropriate category for each converted action in your database.

**Note:** Information in this guide is subject to change. Please visit our Web site at [www.blackbaud.com](http://www.blackbaud.com) to view the most current information before you begin planning your conversion to **The Raiser's Edge 7**. We recommend periodically visiting our Web site during your planning process to view updated requirements or additional conversion information.

- ☐ Enter a default school name in *Configuration*.
- ☐ Enter the individual duplicate criteria and the organization duplicate criteria you selected in version 6.42 if you do not want to use the program defaults in version 7.
- ☐ Enter credit card validation information in *Configuration*.
- ☐ Recreate *Crystal Reports* using the Export Control Reports and Crystal Report Definitions you printed in version 6.42.
- ☐ Select an appropriate event type for each of your organization's events.
- ☐ Change the settings for fields you want to appear as hidden or required.
- ☐ Change the name of any system-defined fields in version 7 that you created a different name for in version 6.42.
- ☐ Recreate mail merge documents.
- ☐ Recreate mailings using the mail parameters you selected in version 6.42.
- ☐ Enter the membership card name default you selected in version 6.42.
- ☐ Set up gift defaults for your membership categories.
- ☐ Recreate Profiles using the Profiles you printed in version 6.42.
- ☐ Recreate queries using the Query Control Report you printed in version 6.42.
- ☐ Recreate exports using the Export Control Reports you created in version 6.42.
- ☐ Run the same queries, exports, and reports you printed before converting and compare the information in each.
- ☐ Enter a school name on the Education record for converted relationship education information.
- ☐ Recreate reports using the report parameters you selected in version 6.42.
- ☐ Select to view the short description or long description in table lookups.

- ☐ Enter security rights for each security group using the information from version 6.42.
- ☐ Enter the sort order for each table using the Code Tables you printed in version 6.42.
- ☐ Check your table values to make sure the values match those entered in your version 6.42.
- ☐ Enter the default value settings from version 6.42 as default sets.
- ☐ Enter Preferences from version 6.42 in User Options.
- ☐ Change your backup routines. We recommend you create new backup procedures for your version 7 database. The location of your version 6.42 database file and your version 7 database files may be different. Make sure your backup software points to the location of all five version 7 data files: re7.db, re\_bio.db, re\_temp.db, re\_index.db, and re\_gift.db. To learn more about backing up your database using the Blackbaud Management Console, see the *Database Administration Guide*.



---

# Field Mapping Guide

As you begin to explore ***The Raiser's Edge*** version 7, you will notice that there are many new fields and features. The Field-Mapping Guide outlines the location of each field in version 6.42 and the corresponding field in version 7. This section also includes fields new to version 7. Many fields with no equivalent in version 7 convert as blank or unmarked. You can use this guide as a reference while making the transition from version 6.42 to version 7. For additional information on how information converts, see the *Conversion Planning Guide*.

## Constituent Biographical Information for Individuals (Bio 1 and Bio 2 Tabs)

| RE 6.42 Field | RE 6.42 Location  | RE 7 Field  | RE 7 Location                       | Notes                                                     |
|---------------|-------------------|-------------|-------------------------------------|-----------------------------------------------------------|
| Import ID     | Statistics button | Import ID   | File, Properties                    | This is the system-generated import ID.                   |
| Last Name     | Bio 1 tab         | Last Name   | Bio 1 tab, Name button              | Click Name for all name fields.                           |
| First Name    | Bio 1 tab         | First Name  | Bio 1 tab, Name button              | Click Name for all name fields.                           |
| Middle Name   | Bio 1 tab         | Middle Name | Bio 1 tab, Name button              | Click Name for all name fields.                           |
| Title 1       | Bio 1 tab         | Title 1     | Bio 1 tab, Name button              | Click Name for all name fields.                           |
| Title 2       | Bio 1 tab         | Title 2     | Bio 1 tab, Name button              | Click Name for all name fields.                           |
| Suffix 1      | Bio 1 tab         | Suffix 1    | Bio 1 tab, Name button              | Click Name for all name fields.                           |
| Suffix 2      | Bio 1 tab         | Suffix 2    | Bio 1 tab, Name button              | Click Name for all name fields.                           |
| N/A           | N/A               | Aliases     | Bio 1 tab, Name button, Aliases tab | Program also adds maiden name in 6.4x to the Aliases tab. |

| RE 6.42 Field   | RE 6.42 Location | RE 7 Field     | RE 7 Location            | Notes                                                                                                                                                                                 |
|-----------------|------------------|----------------|--------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Nickname        | Bio 1 tab        | Nickname       | Bio 1 tab                |                                                                                                                                                                                       |
| Maiden Name     | Bio 1 tab        | Maiden Name    | Bio 1 tab                |                                                                                                                                                                                       |
| Sex             | Bio 1 tab        | Gender         | Bio 1 tab                |                                                                                                                                                                                       |
| N\A             | N\A              | Solicit Code   | Bio 1 tab                | No equivalent field in 6.4x, so this field is blank. See “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for more information.                                               |
| Constituent ID  | Bio 2 tab        | ID             | Bio 1 tab                |                                                                                                                                                                                       |
| Social Security | Bio 2 tab        | SSN            | Bio 1 tab                |                                                                                                                                                                                       |
| Marital Status  | Bio 2 tab        | Marital Status | Bio 1 tab                |                                                                                                                                                                                       |
| Birthplace      | Bio 2 tab        | Birthplace     | Bio 2 tab                |                                                                                                                                                                                       |
| Date of Birth   | Bio 2 tab        | Birthdate      | Bio 1 tab                |                                                                                                                                                                                       |
| N\A             | N\A              | Deceased?      | Bio 1 tab                | If a date appears in the Deceased field on the Bio 2 tab in 6.4x, this checkbox is marked. See “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for other conversion options. |
| Deceased Date   | Bio 2 tab        | Deceased Date  | Bio 1 tab                | If the Deceased? checkbox is marked, indicating yes, then the program selects the date entered in the Deceased field on the Bio 2 tab.                                                |
| Spouse          | Spouse tab       | Spouse         | Bio 1 tab, Spouse button | For detailed spouse information, see “Spouse Information for Individual Records” on page 91.                                                                                          |

| RE 6.42 Field              | RE 6.42 Location | RE 7 Field                                   | RE 7 Location          | Notes                                                                                                                                         |
|----------------------------|------------------|----------------------------------------------|------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| Address                    | Bio 1 tab        | Preferred Address                            | Bio 1 tab, More button | For detailed address information, see “Address Information for Individuals and Organizations” on page 61.                                     |
| Phone(s)                   | Bio 1 tab        | Phones                                       | Bio 1 tab              | For detailed phone information, see “Phone Information” on page 76.                                                                           |
| Constituent is a solicitor | Solicitor tab    | Constituent is a solicitor                   | Bio 1 tab              | For detailed information, see “Constituent Solicitor Information” on page 126.                                                                |
| N\A                        | N\A              | Constituent is inactive                      | Bio 1 tab              | No equivalent field in 6.4x, so this checkbox is unmarked. See “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for more information. |
| N\A                        | N\A              | Constituent has no valid addresses           | Bio 1 tab              | No equivalent field in 6.4x, so this checkbox is unmarked. See “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for more information. |
| N\A                        | N\A              | Constituent normally gives gifts anonymously | Bio 1 tab              | No equivalent field in 6.4x, so this checkbox is unmarked.                                                                                    |
| Education button           | Bio 1 tab        | Education button                             | Bio 1 tab              | For detailed education information, please see “Education Information” on page 84.                                                            |



| RE 6.42 Field   | RE 6.42 Location | RE 7 Field                   | RE 7 Location | Notes                                                                                                                                                              |
|-----------------|------------------|------------------------------|---------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Business button | Bio 1 tab        | Business button              | Bio 1 tab     | For detailed business information, please see "Business Information for Individuals" on page 78.                                                                   |
| Bank button     | Bio 1 tab        | Bank button                  | Bio 1 tab     | For detailed Bank information, please refer to the bank section.                                                                                                   |
| Employ button   | Bio 1 tab        | Business button              | Bio 1 tab     | For detailed Employ information, please see "Employ Information" on page 86. The Employ information is now stored with the Business information as a relationship. |
| Credit Type     | Bio 2 tab        | Card Type                    | Bio 2 tab     | If you enter a credit card number, this field is required in version 7.                                                                                            |
| Card Number     | Bio 2 tab        | Credit Card No.              | Bio 2 tab     |                                                                                                                                                                    |
| Expires On      | Bio 2 tab        | Expiration                   | Bio 2 tab     |                                                                                                                                                                    |
| N\A             | N\A              | Reference (Credit Card Grid) | Bio 2 tab     | No equivalent in 6.4x, so this field is blank.                                                                                                                     |
| Target          | Bio 2 tab        | Target                       | Bio 2 tab     |                                                                                                                                                                    |
| Income          | Bio 2 tab        | Income                       | Bio 2 tab     |                                                                                                                                                                    |
| Ethnicity       | Bio 2 tab        | Ethnicity                    | Bio 2 tab     |                                                                                                                                                                    |
| Religion        | Bio 2 tab        | Religion                     | Bio 2 tab     |                                                                                                                                                                    |
| Receipt Type    | Bio 2 tab        | Receipt type                 | Bio 2 tab     |                                                                                                                                                                    |

| RE 6.42 Field                    | RE 6.42 Location | RE 7 Field                       | RE 7 Location      | Notes                                                                                                                                                                                 |
|----------------------------------|------------------|----------------------------------|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Constituency                     | Bio 2 tab        | Constituency                     | Bio 2 tab          | For detailed constituency information, see “Constituency Codes” on page 91 and “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for more information.                         |
| Constituent is an Honor/Memorial | Bio 1 tab        | Constituent is an honor/memorial | Honor/Memorial tab | For detailed honor/memorial information, please see the “Tribute” on page 128.                                                                                                        |
| Sex                              | Bio 1 tab        | Gender                           | Bio 1 tab          |                                                                                                                                                                                       |
| N\A                              | N\A              | Solicit Code                     | Bio 1 tab          | No equivalent field in 6.4x, so this field is blank. See “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for more information.                                               |
| Constituent ID                   | Bio 2 tab        | ID                               | Bio 1 tab          |                                                                                                                                                                                       |
| Social Security                  | Bio 2 tab        | SSN                              | Bio 1 tab          |                                                                                                                                                                                       |
| Marital Status                   | Bio 2 tab        | Marital Status                   | Bio 1 tab          |                                                                                                                                                                                       |
| Birthplace                       | Bio 2 tab        | Birthplace                       | Bio 2 tab          |                                                                                                                                                                                       |
| Date of Birth                    | Bio 2 tab        | Birthdate                        | Bio 1 tab          |                                                                                                                                                                                       |
| N\A                              | N\A              | Deceased?                        | Bio 1 tab          | If a date appears in the Deceased field on the Bio 2 tab in 6.4x, this checkbox is marked. See “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for other conversion options. |

| RE 6.42 Field              | RE 6.42 Location | RE 7 Field                 | RE 7 Location            | Notes                                                                                                                                         |
|----------------------------|------------------|----------------------------|--------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------|
| Deceased Date              | Bio 2 tab        | Deceased Date              | Bio 1 tab                | If the Deceased? checkbox is marked, indicating yes, then the program selects the date entered in the Deceased field on the Bio 2 tab.        |
| Spouse                     | Spouse tab       | Spouse                     | Bio 1 tab, Spouse button | For detailed spouse information, see "Spouse Information for Individual Records" on page 91.                                                  |
| Address                    | Bio 1 tab        | Preferred Address          | Bio 1 tab, More button   | For detailed address information, see "Address Information for Individuals and Organizations" on page 61.                                     |
| Phone(s)                   | Bio 1 tab        | Phones                     | Bio 1 tab                | For detailed phone information, see "Phone Information" on page 76.                                                                           |
| Constituent is a solicitor | Solicitor tab    | Constituent is a solicitor | Bio 1 tab                | For detailed information, see "Constituent Solicitor Information" on page 126.                                                                |
| N\A                        | N\A              | Constituent is inactive    | Bio 1 tab                | No equivalent field in 6.4x, so this checkbox is unmarked. See "The Raiser's Edge 6 Post Conversion Utility" on page 19 for more information. |

| RE 6.42 Field    | RE 6.42 Location | RE 7 Field                                   | RE 7 Location | Notes                                                                                                                                                       |
|------------------|------------------|----------------------------------------------|---------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------|
| N\A              | N\A              | Constituent has no valid addresses           | Bio 1 tab     | No equivalent field in 6.4x, so this checkbox is unmarked. See “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for more information.               |
| N\A              | N\A              | Constituent normally gives gifts anonymously | Bio 1 tab     | No equivalent field in 6.4x, so this checkbox is unmarked.                                                                                                  |
| N\A              | N\A              | Constituent requests no email                | Bio 1 tab     | No equivalent field in 6.4x, so this checkbox is unmarked.                                                                                                  |
| Education button | Bio 1 tab        | Education button                             | Bio 1 tab     | For detailed education information, see “Education Information” on page 84.                                                                                 |
| Business button  | Bio 1 tab        | Business button                              | Bio 1 tab     | For detailed business information, see “Business Information for Individuals” on page 78.                                                                   |
| Bank button      | Bio 1 tab        | Bank button                                  | Bio 1 tab     | For detailed Bank information, see “Constituent Bank Information” on page 76.                                                                               |
| Employ button    | Bio 1 tab        | Business button                              | Bio 1 tab     | For detailed Employ information, see “Employ Information” on page 86. The Employ information is now stored with the Business information as a relationship. |

| RE 6.42 Field                    | RE 6.42 Location | RE 7 Field                       | RE 7 Location      | Notes                                                                                                                                                         |
|----------------------------------|------------------|----------------------------------|--------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Credit Type                      | Bio 2 tab        | Card Type                        | Bio 2 tab          | If you enter a credit card number, this field is required in version 7.                                                                                       |
| Card Number                      | Bio 2 tab        | Credit Card No.                  | Bio 2 tab          |                                                                                                                                                               |
| Expires On                       | Bio 2 tab        | Expiration                       | Bio 2 tab          |                                                                                                                                                               |
| N\A                              | N\A              | Reference (Credit Card Grid)     | Bio 2 tab          | No equivalent in 6.4x, so this field is blank.                                                                                                                |
| Target                           | Bio 2 tab        | Target                           | Bio 2 tab          |                                                                                                                                                               |
| Income                           | Bio 2 tab        | Income                           | Bio 2 tab          |                                                                                                                                                               |
| Ethnicity                        | Bio 2 tab        | Ethnicity                        | Bio 2 tab          |                                                                                                                                                               |
| Religion                         | Bio 2 tab        | Religion                         | Bio 2 tab          |                                                                                                                                                               |
| Receipt Type                     | Bio 2 tab        | Receipt type                     | Bio 2 tab          |                                                                                                                                                               |
| Constituency                     | Bio 2 tab        | Constituency                     | Bio 2 tab          | For detailed constituency information, see “Constituency Codes” on page 91 and “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for more information. |
| Constituent is an Honor/Memorial | Bio 1 tab        | Constituent is an honor/memorial | Honor/Memorial tab | For detailed honor/memorial information, see the “Tribute” on page 128.                                                                                       |

## Constituent Biographical Information for Organizations (Bio 1 tab and Bio 2 Tabs)

| RE 6.42 Field              | RE 6.42 Location | RE 7 Field                 | RE 7 Location                     | Notes                                                                                                                             |
|----------------------------|------------------|----------------------------|-----------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|
| Import ID                  | Statistic button | Import ID                  | File, Properties                  | This is the system-generated import ID.                                                                                           |
| Name                       | Bio 1 tab        | Name                       | Org 1 tab                         | Click the Name button for all name fields.                                                                                        |
| Alias                      | Bio 1 tab        | Name                       | Org 1 tab, Name button, Alias tab | Click the Name button for all name fields.                                                                                        |
| Address Information        | Bio 1 tab        | Preferred Address          | Org 1 tab, Address tab            | For detailed address information, see “Address Information for Individuals and Organizations” on page 61.                         |
| Phone(s)                   | Bio 1 tab        | Phones                     | Org 1 tab                         | For detailed phone information, see “Phone Information” on page 76.                                                               |
| N\A                        | N\A              | Solicit Code               | Org 1 tab                         | No equivalent in 6.4x, so this field is blank. See “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for more information. |
| Organization Matches Gifts | Bio 1 tab        | Organization Matches Gifts | Org 1 tab                         |                                                                                                                                   |
| Factor                     | Bio 1 tab        | Factor                     | Org 1 tab                         |                                                                                                                                   |
| Fiscal Year Starts         | Bio 1 tab        | Fiscal year starts         | Org 1 tab                         |                                                                                                                                   |
| Max Match Per Gift         | Bio 1 tab        | Maximum per gift           | Org 1 tab                         |                                                                                                                                   |
| Min Match Per Gift         | Bio 1 tab        | Minimum per gift           | Org 1 tab                         |                                                                                                                                   |
| Max Match Annual Per Donor | Bio 1 tab        | Maximum Annual per donor   | Org 1 tab                         |                                                                                                                                   |

| RE 6.42 Field              | RE 6.42 Location | RE 7 Field                   | RE 7 Location | Notes                                                                         |
|----------------------------|------------------|------------------------------|---------------|-------------------------------------------------------------------------------|
| Min Match Annual Per Donor | Bio 1 tab        | Minimum Annual per donor     | Org 1 tab     |                                                                               |
| Max Match Total Per Donor  | Bio 1 tab        | Maximum Total per donor      | Org 1 tab     |                                                                               |
| Min Match Total Per Donor  | Bio 1 tab        | Minimum Total per donor      | Org 1 tab     |                                                                               |
| Match Notes                | Bio 1 tab        | Notes...                     | Org 1 tab     |                                                                               |
| Matchfinder                | Bio 1 tab        | Matchfinder                  |               |                                                                               |
| Bank button                | Bio 1 tab        | Bank button                  | Org 1 tab     | For detailed bank information, see "Constituent Bank Information" on page 76. |
| Parent Corporation         | Bio 2 tab        | Parent corporation           | Org 2 tab     |                                                                               |
| # Employees                | Bio 2 tab        | No. Employees                | Org 2 tab     |                                                                               |
| # Subsidiaries             | Bio 2 tab        | No. Subsidiaries             | Org 2 tab     |                                                                               |
| Income                     | Bio 2 tab        | Income                       | Org 2 tab     |                                                                               |
| Target                     | Bio 2 tab        | Target                       | Org 2 tab     |                                                                               |
| Receipt Type               | Bio 2 tab        | Receipt type                 | Org 2 tab     |                                                                               |
| Constituent ID             | Bio 2 tab        | ID                           | Org 1 tab     |                                                                               |
| N\A                        | N\A              | Card Type                    | Org 2 tab     | No equivalent in 6.4x, so this field is blank.                                |
| N\A                        | N\A              | Credit Card No.              | Org 2 tab     | No equivalent in 6.4x, so this field is blank                                 |
| N\A                        | N\A              | Reference (Credit Card Grid) | Org 2 tab     | No equivalent in 6.4x, so this field is blank                                 |
| Industry                   | Bio 2 tab        | Industry                     | Org 2 tab     |                                                                               |

| RE 6.42 Field | RE 6.42 Location | RE 7 Field                                   | RE 7 Location | Notes                                                                                                                                   |
|---------------|------------------|----------------------------------------------|---------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| N\A           | N\A              | Constituent is inactive                      | Org 1 tab     | No equivalent in 6.4x, so this checkbox is unmarked. See “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for more information. |
| N\A           | N\A              | Constituent is a solicitor                   | Org 1 tab     | No equivalent in 6.4x for organizations, so this checkbox is unmarked.                                                                  |
| N\A           | N\A              | Constituent has no valid addresses           | Org 1 tab     | No equivalent in 6.4x, so this checkbox is unmarked. See “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for more information. |
| N\A           | N\A              | Constituent normally gives gifts anonymously | Org 1 tab     | No equivalent in 6.4x, so this checkbox is unmarked.                                                                                    |



## Address Information for Individuals and Organizations

### Individual Addresses

| RE 6.42 Field                 | RE 6.42 Location       | RE 7 Field   | RE 7 Location          | Notes                                                              |
|-------------------------------|------------------------|--------------|------------------------|--------------------------------------------------------------------|
| Individual Home address block | Bio 1 tab              | Address      | Bio 1 tab, More button | For more information, see the <i>Conversion Planning Guide</i> .   |
| Individual Home City          | Bio 1 tab              | City         | Bio 1 tab, More button |                                                                    |
| Individual Home State         | Bio 1 tab              | State        | Bio 1 tab, More button |                                                                    |
| Individual Home Province      | Bio 1 tab              | Province     | Bio 1 tab, More button | For Canadian versions only. Province is stored in the State table. |
| Individual Home Zip Code      | Bio 1 tab              | ZIP          | Bio 1 tab, More button | Postcode for Canada.                                               |
| Individual Home Country       | Bio 1 tab              | Country      | Bio 1 tab, More button |                                                                    |
| Individual Home Type          | Bio 1 tab, More button | Address type | Bio 1 tab, More button |                                                                    |
| Individual Home Info Source   | Bio 1 tab, More button | Info source  | Bio 1 tab, More button |                                                                    |
| Individual Home County        | Bio 1 tab, More button | County       | Bio 1 tab, More button |                                                                    |
| Individual Home Region        | Bio 1 tab, More button | Region       | Bio 1 tab, More button |                                                                    |
| Individual Home CART          | Bio 1 tab, More button | CART         | Bio 1 tab, More button |                                                                    |

| RE 6.42 Field                 | RE 6.42 Location       | RE 7 Field                                 | RE 7 Location                          | Notes                                                                                       |
|-------------------------------|------------------------|--------------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------|
| Individual Home DPC           | Bio 1 tab, More button | DPC                                        | Bio 1 tab, More button                 |                                                                                             |
| N\A                           | N\A                    | Set this address to the preferred address  | Bio 1 tab, More button                 | For more information, see the <i>Conversion Planning Guide</i> .                            |
| Individual Home Date From     | Bio 1 tab, More button | Date from                                  | Bio 1 tab, More button                 |                                                                                             |
| Individual Home Date To       | Bio 1 tab, More button | Date to                                    | Bio 1 tab, More button                 |                                                                                             |
| N\A                           | N\A                    | Seasonal Address                           | Bio 1 tab, More button                 | This checkbox is marked if seasonal to or from information is present in 6.x.               |
| Individual Home Seasonal From | Bio 1 tab, More button | Seasonal From                              | Bio 1 tab, More button                 |                                                                                             |
| Individual Home Seasonal To   | Bio 1 tab, More button | Seasonal To                                | Bio 1 tab, More button                 |                                                                                             |
| Individual Home Mail to Send  | Bio 1 tab, More button | Send mail to this address                  | Bio 1 tab, More button                 | This is marked for any address selected to receive all or selected mail from 6.4x.          |
| Individual Home Type of Mail  | Bio 1 tab, More button | Mail Attributes                            | Bio 1 tab, More button, Attributes tab | Mail types from 6.4x are found on the address Attributes tab for the corresponding address. |
| N\A                           | N\A                    | Synchronize with Individual Address fields | Bio 1 tab, More button                 |                                                                                             |
| N\A                           | N\A                    | Address as it will be printed              | Bio 1 tab, More button                 | This box is defined based on data entered in certain address fields.                        |

## Organization Addresses

| RE 6.42 Field                       | RE 6.42 Location       | RE 7 Field   | RE 7 Location          | Notes                                                              |
|-------------------------------------|------------------------|--------------|------------------------|--------------------------------------------------------------------|
| Organization Business Address Block | Bio 1 tab              | Address      | Org 1 tab, More button | For more information, see the <i>Conversion Planning Guide</i> .   |
| Organization Business City          | Bio 1 tab              | City         | Org 1 tab, More button |                                                                    |
| Organization Business State         | Bio 1 tab              | State        | Org 1 tab, More button |                                                                    |
| Organization Business Province      | Bio 1 tab              | Province     | Org 1 tab, More button | For Canadian versions only. Province is stored in the State table. |
| Organization Business Zip Code      | Bio 1 tab              | ZIP          | Org 1 tab, More button | Postcode for Canada.                                               |
| Organization Business Country       | Bio 1 tab              | Country      | Org 1 tab, More button |                                                                    |
| Organization Business Type          | Bio 1 tab, More button | Address type | Org 1 tab, More button | For more information, see the “Address Types” on page 65.          |
| Organization Business Info Source   | Bio 1 tab, More button | Info source  | Org 1 tab, More button |                                                                    |
| Organization Business County        | Bio 1 tab, More button | County       | Org 1 tab, More button |                                                                    |
| Organization Business Region        | Bio 1 tab, More button | Region       | Org 1 tab, More button |                                                                    |
| Organization Business CART          | Bio 1 tab, More button | CART         | Org 1 tab, More button |                                                                    |

| RE 6.42 Field                          | RE 6.42 Location       | RE 7 Field                                 | RE 7 Location                          | Notes                                                                                       |
|----------------------------------------|------------------------|--------------------------------------------|----------------------------------------|---------------------------------------------------------------------------------------------|
| Organization Business<br>DPC           | Bio 1 tab, More button | DPC                                        | Org 1 tab, More button                 |                                                                                             |
| N\A                                    | N\A                    | Set this address to the preferred address  | Org 1 tab, More button                 | For more information, see the <i>Conversion Planning Guide</i> .                            |
| Organization Business<br>Date From     | Bio 1 tab, More button | Date from                                  | Org 1 tab, More button                 |                                                                                             |
| Organization Business<br>Date To       | Bio 1 tab, More button | Date to                                    | Org 1 tab, More button                 |                                                                                             |
| N\A                                    | N\A                    | Seasonal Address                           | Org 1 tab, More button                 | This checkbox is marked if seasonal to or from information is present in 6.x.               |
| Organization Business<br>Seasonal From | Bio 1 tab, More button | Seasonal From                              | Org 1 tab, More button                 |                                                                                             |
| Organization Business<br>Seasonal To   | Bio 1 tab, More button | Seasonal To                                | Org 1 tab, More button                 |                                                                                             |
| Organization Business<br>Mail to Send  | Bio 1 tab, More button | Send mail to this address                  | Org 1 tab, More button                 | This is marked for any address selected to receive all or selected mail from 6.4x.          |
| Organization Business<br>Type of Mail  | Bio 1 tab, More button | Mail Attributes                            | Org 1 tab, More button, Attributes tab | Mail types from 6.4x are found on the address Attributes tab for the corresponding address. |
| N\A                                    | N\A                    | Synchronize with Individual Address fields | Bio 1 tab, More button                 |                                                                                             |
| N\A                                    | N\A                    | Address as it will be printed              | Bio 1 tab, More button                 | This box is defined based on data entered in certain address fields.                        |

## Address Types

The address type is required in version 7. The following table shows the address types assigned to any blank address type fields during the conversion.

| Version 7.0                                               | Version 6.4.2                                                  | Version 6.4.2                                                                                                                                                          |
|-----------------------------------------------------------|----------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Address Type                                              | Record Type                                                    | Address Location                                                                                                                                                       |
| RE7 Conversion - Org                                      | Organization                                                   | Bio 1 tab                                                                                                                                                              |
| RE7 Conversion - Home                                     | Individual                                                     | Bio 1 tab                                                                                                                                                              |
| RE7 Conversion - Business                                 | Individual                                                     | Bio 1 tab, Business button                                                                                                                                             |
| RE7 Conversion - Alt                                      | Individual                                                     | Bio 1 tab, Alt button                                                                                                                                                  |
| RE7 Conversion - Spouse Home                              | Individual                                                     | Bio 1 tab<br>For more information, see the <i>Conversion Planning Guide</i> .                                                                                          |
| RE7 Conversion - Spouse Alt                               | Individual                                                     | Bio 1 tab, Alt button<br>For more information, see the <i>Conversion Planning Guide</i> .                                                                              |
| RE7 Conversion - Spouse Org                               | Individual                                                     | Spouse tab, Business button                                                                                                                                            |
| RE 7 Conversion - Spouse Business<br>(same as Spouse Org) | Individual                                                     | Spouse tab, Business button                                                                                                                                            |
| RE 7 Conversion - Affiliation                             | Individual linked to an organization that is a constituent.    | If the organization has an address the affiliation lists on the individual constituent record, Relationships tab, Organizations and the address has this address type. |
| RE 7 Conversion - Employment                              | Individual linked to an organization that is a constituent.    | If the organization has an address the affiliation lists on the individual constituent record, Relationships tab, Organizations and the address has this address type. |
| RE 7 Conversion - Relation                                | Individual linked to another individual that is a constituent. | If the linked individual has an address, the affiliation lists on the constituent record, Relationships tab, Individuals and the address has this address type.        |
| RE7 Conversion - Contact                                  | Organization                                                   | Contacts tab                                                                                                                                                           |

## International Address Fields

In version 7, address fields are specific to the country selected on the constituent record address screen. Information entered in address fields in version 6.4.1 or higher version of 6.x that does not apply to the specific country converts as an address attribute. For more information, see the *Conversion Planning Guide*.

| Database Version | Country Address | RE 6.42 Field | RE 6.42 Location       | RE 7 Location                                    | Notes |
|------------------|-----------------|---------------|------------------------|--------------------------------------------------|-------|
| United States    | United Kingdom  | State         | Bio 1 tab              | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |
|                  |                 | CART          | Bio 1 tab, More button | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |
|                  |                 | DPC           | Bio 1 tab, More button | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |
|                  | Canada          | DPC           | Bio 1 tab, More button | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |
|                  | New Zealand     | State         | Bio 1 tab              | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |
|                  |                 | County        | Bio 1 tab, More button | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |
| Canada           | United Kingdom  | Province      | Bio 1 tab              | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |
| Canada           |                 | CART          | Bio 1 tab, More button | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |
|                  |                 | DPC           | Bio 1 tab, More button | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |

| Database Version | Country Address | RE 6.42 Field | RE 6.42 Location       | RE 7 Location                                    | Notes |
|------------------|-----------------|---------------|------------------------|--------------------------------------------------|-------|
|                  | Canada          | DPC           | Bio 1 tab, More button | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |
|                  | New Zealand     | Province      | Bio 1 tab              | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |
|                  |                 | County        | Bio 1 tab, More button | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |
| New Zealand      | Canada          | Suburb        | Bio 1 tab              | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |
|                  | United States   | Suburb        | Bio 1 tab              | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |
| New Zealand      | United Kingdom  | Suburb        | Bio 1 tab              | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |
|                  |                 | CART          | Bio 1 tab, More button | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |
| Australia        | United Kingdom  | State         | Bio 1 tab              | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |
|                  |                 | CART          | Bio 1 tab, More button | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |
|                  |                 | DPID          | Bio 1 tab, More button | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |

| Database Version | Country Address | RE 6.42 Field | RE 6.42 Location       | RE 7 Location                                    | Notes |
|------------------|-----------------|---------------|------------------------|--------------------------------------------------|-------|
|                  | Canada          | DPID          | Bio 1 tab, More button | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |
| Australia        | New Zealand     | State         | Bio 1 tab              | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |
|                  |                 | County        | Bio 1 tab, More button | Bio 1 tab/Org 1 tab, More button, Attributes tab |       |



## Additional Address Information – Alternate Addresses, Contacts, Business, Spouse, Spouse Business

| RE 6.42 Field             | RE 6.42 Location      | RE 7 Field                                | RE 7 Location | Notes                                                            |
|---------------------------|-----------------------|-------------------------------------------|---------------|------------------------------------------------------------------|
| Alternate – Address Block | Bio 1 tab, Alt button | Address                                   | Addresses tab |                                                                  |
| Alternate – City          | Bio 1 tab, Alt button | City                                      | Addresses tab |                                                                  |
| Alternate – State         | Bio 1 tab, Alt button | State                                     | Addresses tab |                                                                  |
| Alternate – Province      | Bio 1 tab, Alt button | Province                                  | Addresses tab | For Canadian clients only.                                       |
| Alternate – Zip Code      | Bio 1 tab, Alt button | ZIP                                       | Addresses tab | Postcode for Canada.                                             |
| Alternate – Country       | Bio 1 tab, Alt button | Country                                   | Addresses tab |                                                                  |
| Alternate – Type          | Bio 1 tab, Alt button | Address type                              | Addresses tab | For more information, see the “Address Types” on page 65.        |
| Alternate – Info Source   | Bio 1 tab, Alt button | Info source                               | Addresses tab |                                                                  |
| Alternate – County        | Bio 1 tab, Alt button | County                                    | Addresses tab |                                                                  |
| Alternate – Region        | Bio 1 tab, Alt button | Region                                    | Addresses tab |                                                                  |
| Alternate – CART          | Bio 1 tab, Alt button | CART                                      | Addresses tab |                                                                  |
| Alternate – DPC           | Bio 1 tab, Alt button | DPC                                       | Addresses tab |                                                                  |
| N\A                       | N\A                   | Set this address to the preferred address | Addresses tab | For more information, see the <i>Conversion Planning Guide</i> . |
| Alternate – Date From     | Bio 1 tab, Alt button | Date from                                 | Addresses tab |                                                                  |

| RE 6.42 Field                               | RE 6.42 Location           | RE 7 Field                | RE 7 Location                            | Notes                                                                                       |
|---------------------------------------------|----------------------------|---------------------------|------------------------------------------|---------------------------------------------------------------------------------------------|
| Alternate – Date To                         | Bio 1 tab, Alt button      | Date to                   | Addresses tab                            |                                                                                             |
| N\A                                         | N\A                        | Seasonal Address          | Addresses tab                            | This checkbox is marked if seasonal to or from information is present in 6.x.               |
| Alternate – Seasonal From                   | Bio 1 tab, Alt button      | Seasonal from             | Addresses tab                            |                                                                                             |
| Alternate – Seasonal To                     | Bio 1 tab, Alt button      | Seasonal to               | Addresses tab                            |                                                                                             |
| Alternate – Mail to Send                    | Bio 1 tab, Alt button      | Send mail to this address | Addresses tab                            | This is marked for any address selected to receive all or selected mail from 6.4x.          |
| Alternate – Type of Mail                    | Bio 1 tab, Alt button      | Mail Attributes           | Addresses tab, Attributes tab            | Mail types from 6.4x are found on the address Attributes tab for the corresponding address. |
| Individual – Business Address Address Block | Bio 1 tab, Business button | Address                   | Bio 1 tab, Business button\Addresses tab |                                                                                             |
| Individual – Business Address City          | Bio 1 tab, Business button | City                      | Bio 1 tab, Business button\Addresses tab |                                                                                             |
| Individual – Business Address State         | Bio 1 tab, Business button | State                     | Bio 1 tab, Business button\Addresses tab |                                                                                             |
| Individual – Business Address Province      | Bio 1 tab, Business button | Province                  | Bio 1 tab, Business button\Addresses tab | For Canadian clients only.                                                                  |
| Individual – Business Address Zip Code      | Bio 1 tab, Business button | ZIP                       | Bio 1 tab, Business button\Addresses tab | Postcode for Canada.                                                                        |
| Individual – Business Address Country       | Bio 1 tab, Business button | Country                   | Bio 1 tab, Business button\Addresses tab |                                                                                             |

| RE 6.42 Field                               | RE 6.42 Location           | RE 7 Field                                | RE 7 Location                            | Notes                                                            |
|---------------------------------------------|----------------------------|-------------------------------------------|------------------------------------------|------------------------------------------------------------------|
| Individual – Business Address Type          | Bio 1 tab, Business button | Address type                              | Bio 1 tab, Business button\Addresses tab |                                                                  |
| Individual – Business Address Info Source   | Bio 1 tab, Business button | Info source                               | Bio 1 tab, Business button\Addresses tab |                                                                  |
| Individual – Business Address County        | Bio 1 tab, Business button | County                                    | Bio 1 tab, Business button\Addresses tab |                                                                  |
| Individual – Business Address Region        | Bio 1 tab, Business button | Region                                    | Bio 1 tab, Business button\Addresses tab |                                                                  |
| Individual – Business Address CART          | Bio 1 tab, Business button | CART                                      | Bio 1 tab, Business button\Addresses tab |                                                                  |
| DPC                                         | Bio 1 tab, Business button | DPC                                       | Bio 1 tab, Business button\Addresses tab |                                                                  |
| N\A                                         | N\A                        | Set this address to the preferred address | Bio 1 tab, Business button\Addresses tab | For more information, see the <i>Conversion Planning Guide</i> . |
| Individual – Business Address Date From     | Bio 1 tab, Business button | Date from                                 | Bio 1 tab, Business button\Addresses tab |                                                                  |
| Individual – Business Address Date To       | Bio 1 tab, Business button | Date to                                   | Bio 1 tab, Business button\Addresses tab |                                                                  |
| N\A                                         | N\A                        | Seasonal Address                          | Bio 1 tab, Business button\Addresses tab |                                                                  |
| Individual – Business Address Seasonal From | Bio 1 tab, Business button | Seasonal from                             | Bio 1 tab, Business button\Addresses tab |                                                                  |
| Individual – Business Address Seasonal To   | Bio 1 tab, Business button | Seasonal to                               | Bio 1 tab, Business button\Addresses tab |                                                                  |

| RE 6.42 Field                                         | RE 6.42 Location            | RE 7 Field                | RE 7 Location                                            | Notes                                                                                       |
|-------------------------------------------------------|-----------------------------|---------------------------|----------------------------------------------------------|---------------------------------------------------------------------------------------------|
| Individual – Business Address<br>Mail to Send         | Bio 1 tab, Business button  | Send mail to this address | Bio 1 tab, Business button\Addresses tab                 | This is marked for any address selected to receive all or selected mail from 6.4x.          |
| Individual – Business Address<br>Type of Mail         | Bio 1 tab, Business button  | Mail Attributes           | Bio 1 tab, Business button\Addresses tab, Attributes tab | Mail types from 6.4x are found on the address Attributes tab for the corresponding address. |
| Individual – Spouse Business Address<br>Address Block | Spouse tab, Business button | Address                   | Bio 1 tab Spouse button, Addresses tab\ Relationship tab |                                                                                             |
| Individual – Spouse Business Address<br>City          | Spouse tab, Business button | City                      | Bio 1 tab Spouse button, Addresses tab\ Relationship tab |                                                                                             |
| Individual – Spouse Business Address<br>State         | Spouse tab, Business button | State                     | Bio 1 tab Spouse button, Addresses tab\ Relationship tab |                                                                                             |
| Individual – Spouse Business Address<br>Province      | Spouse tab, Business button | Province                  | Bio 1 tab Spouse button, Addresses tab\ Relationship tab | For Canadian clients only.                                                                  |
| Individual – Spouse Business Address<br>Zip Code      | Spouse tab, Business button | ZIP                       | Bio 1 tab Spouse button, Addresses tab\ Relationship tab | Postcode for Canada.                                                                        |
| Individual – Spouse Business Address<br>Country       | Spouse tab, Business button | Country                   | Bio 1 tab Spouse button, Addresses tab\ Relationship tab |                                                                                             |
| Individual – Spouse Business Address<br>Type          | Spouse tab, Business button | Address type              | Bio 1 tab Spouse button, Addresses tab\ Relationship tab | For more information, see the “Address Types” on page 65.                                   |
| Individual – Spouse Business<br>Info Source           | Spouse tab, Business button | Info source               | Bio 1 tab Spouse button, Addresses tab\ Relationship tab |                                                                                             |

| RE 6.42 Field                                         | RE 6.42 Location               | RE 7 Field                | RE 7 Location                                            | Notes                                                                              |
|-------------------------------------------------------|--------------------------------|---------------------------|----------------------------------------------------------|------------------------------------------------------------------------------------|
| Individual – Spouse Business Address<br>County        | Spouse tab,<br>Business button | County                    | Bio 1 tab Spouse button, Addresses tab\ Relationship tab |                                                                                    |
| Individual – Spouse Business Address<br>Region        | Spouse tab,<br>Business button | Region                    | Bio 1 tab Spouse button, Addresses tab\ Relationship tab |                                                                                    |
| Individual – Spouse Business Address<br>CART          | Spouse tab,<br>Business button | CART                      | Bio 1 tab Spouse button, Addresses tab\ Relationship tab |                                                                                    |
| Individual – Spouse Business Address<br>DPC           | Spouse tab,<br>Business button | DPC                       | Bio 1 tab Spouse button, Addresses tab\ Relationship tab |                                                                                    |
| Individual – Spouse Business Address<br>Date From     | Spouse tab,<br>Business button | Date from                 | Bio 1 tab Spouse button, Addresses tab\ Relationship tab |                                                                                    |
| Individual – Spouse Business Address<br>Date To       | Spouse tab,<br>Business button | Date to                   | Bio 1 tab Spouse button, Addresses tab\ Relationship tab |                                                                                    |
| N\A                                                   | N\A                            | Seasonal Address          | Bio 1 tab Spouse button, Addresses tab\ Relationship tab | This checkbox is marked if seasonal to or from information is present in 6.x.      |
| Individual – Spouse Business Address<br>Seasonal From | Spouse tab,<br>Business button | Seasonal from             | Bio 1 tab Spouse button, Addresses tab\ Relationship tab |                                                                                    |
| Individual – Spouse Business Address<br>Seasonal To   | Spouse tab,<br>Business button | Seasonal to               | Bio 1 tab Spouse button, Addresses tab\ Relationship tab |                                                                                    |
| Individual – Spouse Business Address<br>Mail to Send  | Spouse tab,<br>Business button | Send mail to this address | Bio 1 tab Spouse button, Addresses tab\ Relationship tab | This is marked for any address selected to receive all or selected mail from 6.4x. |

| RE 6.42 Field                                           | RE 6.42 Location               | RE 7 Field      | RE 7 Location                                                                     | Notes                                                                                                      |
|---------------------------------------------------------|--------------------------------|-----------------|-----------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|
| Individual – Spouse<br>Business Address<br>Type of Mail | Spouse tab,<br>Business button | Mail Attributes | Bio 1 tab Spouse<br>button, Addresses<br>tab\ Relationship<br>tab, Attributes tab | Mail types from<br>6.4x are found on<br>the address<br>Attributes tab for<br>the corresponding<br>address. |
| Contact Address –<br>Address Block                      | Contact tab                    | Address         | Organization<br>Relationship<br>tab\Addresses tab                                 |                                                                                                            |
| Contact Address –<br>City                               | Contact tab                    | City            | Organization<br>Relationship<br>tab\Addresses tab                                 |                                                                                                            |
| Contact Address –<br>State                              | Contact tab                    | State           | Organization<br>Relationship<br>tab\Addresses tab                                 |                                                                                                            |
| Contact Address –<br>Zip Code                           | Contact tab                    | ZIP             | Organization<br>Relationship<br>tab\Addresses tab                                 |                                                                                                            |
| Contact Address –<br>Country                            | Contact tab                    | Country         | Organization<br>Relationship<br>tab\Addresses tab                                 |                                                                                                            |
| Contact Address –<br>Type                               | Contact tab                    | Address type    | Organization<br>Relationship<br>tab\Addresses tab                                 | For more<br>information, see<br>the “Address<br>Types” on page 65.                                         |
| Contact Address –<br>Info Source                        | Contact tab                    | Info source     | Organization<br>Relationship<br>tab\Addresses tab                                 |                                                                                                            |
| Contact Address –<br>County                             | Contact tab                    | County          | Organization<br>Relationship<br>tab\Addresses tab                                 |                                                                                                            |
| Contact Address –<br>Region                             | Contact tab                    | Region          | Organization<br>Relationship<br>tab\Addresses tab                                 |                                                                                                            |
| Contact Address –<br>CART                               | Contact tab                    | CART            | Organization<br>Relationship<br>tab\Addresses tab                                 |                                                                                                            |
| Contact Address –<br>DPC                                | Contact tab                    | DPC             | Organization<br>Relationship<br>tab\Addresses tab                                 |                                                                                                            |

| RE 6.42 Field                   | RE 6.42 Location | RE 7 Field                                | RE 7 Location                                               | Notes                                                                                       |
|---------------------------------|------------------|-------------------------------------------|-------------------------------------------------------------|---------------------------------------------------------------------------------------------|
| N\A                             | N\A              | Set this address to the preferred address | Organization Relationship tab\Addresses tab                 | For more information, see the <i>Conversion Planning Guide</i> .                            |
| Contact Address – Date From     | Contact tab      | Date from                                 | Organization Relationship tab\Addresses tab                 |                                                                                             |
| Contact Address – Date To       | Contact tab      | Date to                                   | Organization Relationship tab\Addresses tab                 |                                                                                             |
| N\A                             | N\A              | Seasonal Address                          | Organization Relationship tab\Addresses tab                 | This checkbox is marked if seasonal to or from information is present in 6.x.               |
| Contact Address – Seasonal From | Contact tab      | Seasonal From                             | Organization Relationship tab\Addresses tab                 |                                                                                             |
| Contact Address – Seasonal To   | Contact tab      | Seasonal To                               | Organization Relationship tab\Addresses tab                 |                                                                                             |
| Contact Address – Mail to Send  | Contact tab      | Send mail to this address                 | Organization Relationship tab\Addresses tab                 | This is marked for any address selected to receive all or selected mail from 6.4x.          |
| Contact Address – Type of Mail  | Contact tab      | Mail Attributes                           | Organization Relationship tab\Addresses tab, Attributes tab | Mail types from 6.4x are found on the address Attributes tab for the corresponding address. |

## Phone Information

| RE 6.42 Field | RE 6.42 Location                                       | RE 7 Field   | RE 7 Location                                                        | Notes |
|---------------|--------------------------------------------------------|--------------|----------------------------------------------------------------------|-------|
| Phone Type    | Bio 1 tab (or anywhere that phone numbers are stored). | Phone Type   | Bio 1 tab (or anywhere that phone numbers are stored). Type Column   |       |
| Phone Number  | Bio 1 tab (or anywhere that phone numbers are stored). | Phone Number | Bio 1 tab (or anywhere that phone numbers are stored). Number Column |       |

## Constituent Bank Information

| RE 6.42 Field           | RE 6.42 Location       | RE 7 Field             | RE 7 Location                                          | Notes                         |
|-------------------------|------------------------|------------------------|--------------------------------------------------------|-------------------------------|
| Tran/Rout# – US         | Bio 1 tab, Bank button | Transit/Routing Number | Bio 1 tab/Org 1, Bank button, General tab              |                               |
| Institution ID – Canada | Bio 1 tab, Bank button | Institution ID         | Bio 1 tab/Org 1, Bank button, General tab              |                               |
| Name                    | Bio 1 tab, Bank button | Bank name              | Bio 1 tab/Org 1, Bank button, General tab              | This is the bank branch name. |
| Branch                  | Bio 1 tab, Bank button | Financial institution  | Bio 1 tab/Org 1, Bank button, General tab              |                               |
| Address                 | Bio 1 tab, Bank button | Address                | Bio 1 tab/Org 1, Bank button, General tab, More button |                               |
| City                    | Bio 1 tab, Bank button | City                   | Bio 1 tab/Org 1, Bank button, General tab, More button |                               |
| State                   | Bio 1 tab, Bank button | State                  | Bio 1 tab/Org 1, Bank button, General tab, More button |                               |



| RE 6.42 Field  | RE 6.42 Location       | RE 7 Field                                                  | RE 7 Location                                          | Notes                                                |
|----------------|------------------------|-------------------------------------------------------------|--------------------------------------------------------|------------------------------------------------------|
| Province       | Bio 1 tab, Bank button | Province                                                    | Bio 1 tab/Org 1, Bank button, General tab, More button | Canadian version                                     |
| County         | Bio 1 tab, Bank button | County                                                      | Bio 1 tab/Org 1, Bank button, General tab, More button |                                                      |
| Country        | Bio 1 tab, Bank button | Country                                                     | Bio 1 tab/Org 1, Bank button, General tab, More button |                                                      |
| Region         | Bio 1 tab, Bank button | Region                                                      | Bio 1 tab/Org 1, Bank button, General tab, More button |                                                      |
| Zip            | Bio 1 tab, Bank button | ZIP – US<br>POST – UK,<br>Australia, Canada,<br>New Zealand | Bio 1 tab/Org 1, Bank button, General tab, More button |                                                      |
| N\A            | N\A                    | Phone Type                                                  | Bio 1 tab/Org 1, Bank button, General tab, More button |                                                      |
| Phone Number   | Bio 1 tab, Bank button | Phone Number                                                | Bio 1 tab/Org 1, Bank button, General tab, More button |                                                      |
| Account Number | Bio 1 tab, Bank button | Account number                                              | Bio 1 tab/Org 1, Bank button, General tab              |                                                      |
| Account Type   | Bio 1 tab, Bank button | Account type                                                | Bio 1 tab/Org 1, Bank button, General tab              |                                                      |
| N\A            | N\A                    | This account is inactive                                    | Bio 1 tab/Org 1, Bank button, General tab              | No equivalent for this in 6.4x, so this is unmarked. |

| RE 6.42 Field | RE 6.42 Location | RE 7 Field                 | RE 7 Location                             | Notes                                                                                                                                   |
|---------------|------------------|----------------------------|-------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| N\A           | N\A              | Primary bank information   | Bio 1 tab/Org 1, Bank button, General tab | If only one bank is entered on the 6.x record, it is the primary bank. If more than one bank is present, the first bank is the primary. |
| N\A           | N\A              | Bank notes                 | Bio 1 tab/Org 1, Bank button, General tab | No equivalent for this in 6.4x, so this is blank.                                                                                       |
| N\A           | N\A              | Use Transit/Routing number | Bio 1 tab/Org 1, Bank button, General tab | No equivalent for this in 6.4x, so this is blank.                                                                                       |

## Business Information for Individuals

Business information is stored as a relationship in *The Raiser's Edge 7*. To have all business information accessible in a central location, the Employ information on the Bio 1 tab in *The Raiser's Edge* version 6.42 is also stored as a relationship.

| RE 6.42 Field | RE 6.42 Location           | RE 7 Field                   | RE 7 Location                                   | Comments                                                                                                                                                                      |
|---------------|----------------------------|------------------------------|-------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Org Name      | Bio 1 tab, Business button | Name                         | Bio 1 tab, Business button and Relationship tab |                                                                                                                                                                               |
| N\A           | N\A                        | Primary business information | Bio 1 tab, Business button and Relationship tab | The business located on the Business button in 6.4x is marked as the Primary business record in version 7. The Primary business information checkbox is marked automatically. |
| Industry      | Bio 1 tab, Business button | Industry                     | Bio 1 tab, Business button and Relationship tab |                                                                                                                                                                               |
| Profession    | Bio 1 tab, Business button | Profession                   | Bio 1 tab, Business button and Relationship tab |                                                                                                                                                                               |
| Income Level  | Bio 1 tab, Business button | Income                       | Bio 1 tab, Business button and Relationship tab |                                                                                                                                                                               |

| RE 6.42 Field            | RE 6.42 Location           | RE 7 Field                | RE 7 Location                                                | Comments                                                                           |
|--------------------------|----------------------------|---------------------------|--------------------------------------------------------------|------------------------------------------------------------------------------------|
| Position                 | Bio 1 tab, Business button | Position                  | Bio 1 tab, Business button and Relationship tab              |                                                                                    |
| Print                    | Bio 1 tab, Business button | Print?                    | Bio 1 tab, Business button and Relationship tab              |                                                                                    |
| N\A                      | N\A                        | Relationship              | Bio 1 tab, Business button and Relationship tab              | No equivalent for this field in 6.4x, so this is blank.                            |
| N\A                      | N\A                        | Reciprocal                | Bio 1 tab, Business button and Relationship tab              | No equivalent for this field in 6.4x, so this is blank.                            |
| Address Block            | Bio 1 tab, Business button | Address                   | Bio 1 tab, Business button, More button and Relationship tab |                                                                                    |
| City                     | Bio 1 tab, Business button | City                      | Bio 1 tab, Business button, More button and Relationship tab |                                                                                    |
| State                    | Bio 1 tab, Business button | State                     | Bio 1 tab, Business button, More button and Relationship tab |                                                                                    |
| Province                 | Bio 1 tab, Business button | Province                  | Bio 1 tab, Business button, More button and Relationship tab | For Canadian version only.                                                         |
| ZIP                      | Bio 1 tab, Business button | Zip                       | Bio 1 tab, Business button, More button and Relationship tab | Postcode for Canada.                                                               |
| Country                  | Bio 1 tab, Business button | Country                   | Bio 1 tab, Business button, More button and Relationship tab |                                                                                    |
| More Mailing Information | Bio 1 tab, Business button | Send mail to this address | Bio 1 tab, Business button, More button and Relationship tab | This is marked for any address selected to receive all or selected mail from 6.4x. |

| RE 6.42 Field                        | RE 6.42 Location           | RE 7 Field                                | RE 7 Location                                                | Comments                                                                                                                                          |
|--------------------------------------|----------------------------|-------------------------------------------|--------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------|
| More Type of Mail or Mail to Receive | Bio 1 tab, Business button | Mail Attributes                           | Bio 1 tab, Business button, More button and Relationship tab | Mail types from 6.4x are found on the address Attributes tab for the corresponding address.                                                       |
| Address Type                         | Bio 1 tab, Business button | Address type                              | Bio 1 tab, Business button, More button and Relationship tab | For more information, see the “Address Types” on page 65.                                                                                         |
| Info Source                          | Bio 1 tab, Business button | Info source                               | Bio 1 tab, Business button, More button and Relationship tab |                                                                                                                                                   |
| County                               | Bio 1 tab, Business button | County                                    | Bio 1 tab, Business button, More button and Relationship tab |                                                                                                                                                   |
| Region                               | Bio 1 tab, Business button | Region                                    | Bio 1 tab, Business button, More button and Relationship tab |                                                                                                                                                   |
| CART                                 | Bio 1 tab, Business button | CART                                      | Bio 1 tab, Business button, More button and Relationship tab |                                                                                                                                                   |
| N\A                                  | N\A                        | Set this address to the preferred address | Bio 1 tab, Business button, More button and Relationship tab | The address on the Bio 1 tab for Organizations and Individuals in 6.4x is marked as the preferred address. This checkbox is marked automatically. |
| Valid Date Range Date From           | Bio 1 tab, Business button | Date from                                 | Bio 1 tab, Business button, More button and Relationship tab |                                                                                                                                                   |
| Valid Date Range Date To             | Bio 1 tab, Business button | Date to                                   | Bio 1 tab, Business button, More button and Relationship tab |                                                                                                                                                   |

| RE 6.42 Field                  | RE 6.42 Location           | RE 7 Field                            | RE 7 Location                                                | Comments                                                                      |
|--------------------------------|----------------------------|---------------------------------------|--------------------------------------------------------------|-------------------------------------------------------------------------------|
| N\A                            | N\A                        | Seasonal Address                      | Bio 1 tab, Business button, More button and Relationship tab | This checkbox is marked if seasonal to or from information is present in 6.x. |
| Valid Date Range Seasonal From | Bio 1 tab, Business button | Seasonal from                         | Bio 1 tab, Business button, More button and Relationship tab |                                                                               |
| Valid Date Range Seasonal To   | Bio 1 tab, Business button | Seasonal to                           | Bio 1 tab, Business button, More button and Relationship tab |                                                                               |
| Phone(s)                       | Bio 1 tab, Business button | Phones                                | Bio 1 tab, Business button                                   |                                                                               |
| Phone Number                   | Bio 1 tab, Business button | Phone Number                          | Bio 1 tab, Business button                                   |                                                                               |
| N\A                            | N\A                        | Print organization name with address  | Bio 1 tab, Business button                                   | No equivalent in 6.4x, so this is unmarked.                                   |
| Org Matches Gifts              | Bio 1 tab, Business button | {Org} matches gifts for {Constituent} | Bio 1 tab, Business button, Matching tab                     |                                                                               |
| Factor                         | Bio 1 tab, Business button | Factor                                | Bio 1 tab, Business button, Matching tab                     |                                                                               |
| Fiscal Year Starts             | Bio 1 tab, Business button | Fiscal year starts                    | Bio 1 tab, Business button, Matching tab                     |                                                                               |
| Maximum Per Gift               | Bio 1 tab, Business button | Maximum per gift                      | Bio 1 tab, Business button, Matching tab                     |                                                                               |
| Minimum Per Gift               | Bio 1 tab, Business button | Minimum per gift                      | Bio 1 tab, Business button, Matching tab                     |                                                                               |
| Maximum Annual Per donor       | Bio 1 tab, Business button | Maximum Annual per donor              | Bio 1 tab, Business button, Matching tab                     |                                                                               |
| Minimum Annual Per donor       | Bio 1 tab, Business button | Minimum annual per donor              | Bio 1 tab, Business button, Matching tab                     |                                                                               |

| RE 6.42 Field                     | RE 6.42 Location           | RE 7 Field                                      | RE 7 Location                            | Comments                                                                                           |
|-----------------------------------|----------------------------|-------------------------------------------------|------------------------------------------|----------------------------------------------------------------------------------------------------|
| Maximum Total Per Donor           | Bio 1 tab, Business button | Maximum total per donor                         | Bio 1 tab, Business button, Matching tab |                                                                                                    |
| Minimum Total Per Donor           | Bio 1 tab, Business button | Minimum total per donor                         | Bio 1 tab, Business button, Matching tab |                                                                                                    |
| Notes – From the Matching section | Bio 1 tab, Business button | Match notes                                     | Bio 1 tab, Business button, Matching tab |                                                                                                    |
| N\A                               | N\A                        | Contact                                         | Bio 1 tab, Business button               |                                                                                                    |
| N\A                               | N\A                        | Contact type                                    | Bio 1 tab, Business button               | For more information about contacts, see “Contact Information on Organization Records” on page 96. |
| N\A                               | N\A                        | Do not mail to this contact                     | Bio 1 tab, Business button               | If the contact address is marked No Mail in 6.4x, then this is marked.                             |
| N\A                               | N\A                        | Employee of this organization                   | Bio 1 tab, Business button               |                                                                                                    |
| N\A                               | N\A                        | Date from                                       | Bio 1 tab, Business button               | No equivalent in 6.4x, so this field is blank                                                      |
| N\A                               | N\A                        | Date To                                         | Bio 1 tab, Business button               | No equivalent in 6.4x, so this field is blank                                                      |
| N\A                               | N\A                        | Acknowledge this organization for hon/mem gifts | Bio 1 tab, Business button               | No equivalent in 6.4x, so this field is blank                                                      |
| N\A                               | N\A                        | Send to                                         | Bio 1 tab, Business button               | No equivalent in 6.4x, so this field is blank                                                      |

---

| RE 6.42 Field | RE 6.42 Location | RE 7 Field                                            | RE 7 Location                         | Comments                                      |
|---------------|------------------|-------------------------------------------------------|---------------------------------------|-----------------------------------------------|
| N\A           | N\A              | Automatically soft credit this organization for gifts | Bio 1 tab, Business button            | No equivalent in 6.4x, so this field is blank |
| N\A           | N\A              | Attributes/Notes tab                                  | Business button, Attributes/Notes tab | No equivalent in 6.4x, so this field is blank |

## Education Information

| RE 6.42 Field              | RE 6.42 Location            | RE 7 Field                          | RE 7 Location                                                                           | Comments                                                         |
|----------------------------|-----------------------------|-------------------------------------|-----------------------------------------------------------------------------------------|------------------------------------------------------------------|
| Primary Alumni Information | Bio 1 tab, Education button | Primary alumni information checkbox | Bio 1 tab (Or anywhere there are education records stored) Education button, School tab |                                                                  |
| School name                | Bio 1 tab, Education button | School name                         | Bio 1 tab (Or anywhere there are education records stored) Education button, School tab | For more information, see the <i>Conversion Planning Guide</i> . |
| Type                       | Bio 1 tab, Education button | Type                                | Bio 1 tab (Or anywhere there are education records stored) Education button, School tab |                                                                  |
| Class of                   | Bio 1 tab, Education button | Class of                            | Bio 1 tab (Or anywhere there are education records stored) Education button, School tab |                                                                  |
| Date Entered               | Bio 1 tab, Education button | Date entered                        | Bio 1 tab (Or anywhere there are education records stored) Education button, School tab |                                                                  |
| Date Left                  | Bio 1 tab, Education button | Date left                           | Bio 1 tab (Or anywhere there are education records stored) Education button, School tab |                                                                  |
| Date Graduated             | Bio 1 tab, Education button | Date graduated                      | Bio 1 tab (Or anywhere there are education records stored) Education button, School tab |                                                                  |
| Known Name                 | Bio 1 tab, Education button | Known name                          | Bio 1 tab (Or anywhere there are education records stored) Education button, School tab |                                                                  |



| RE 6.42 Field | RE 6.42 Location            | RE 7 Field    | RE 7 Location                                                                           | Comments                                                                                                                    |
|---------------|-----------------------------|---------------|-----------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------|
| Campus        | Bio 1 tab, Education button | Campus        | Bio 1 tab (Or anywhere there are education records stored) Education button, School tab |                                                                                                                             |
| Frat/Sorority | Bio 1 tab, Education button | Frat/Sorority | Bio 1 tab (Or anywhere there are education records stored) Education button, School tab |                                                                                                                             |
| Degree        | Bio 1 tab, Education button | Degree        | Bio 1 tab (Or anywhere there are education records stored) Education button, School tab |                                                                                                                             |
| GPA           | Bio 1 tab, Education button | GPA           | Bio 1 tab (Or anywhere there are education records stored) Education button, School tab |                                                                                                                             |
| N\A           | N\A                         | Status        | Bio 1 tab (Or anywhere there are education records stored) Education button, School tab | No equivalent in 6.4x, so this is blank.                                                                                    |
| N\A           | N\A                         | Major         | Bio 1 tab (Or anywhere there are education records stored) Education button, School tab | No equivalent in 6.4x, so this is blank. See “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for more information. |
| N\A           | N\A                         | Minor         | Bio 1 tab (Or anywhere there are education records stored) Education button, School tab | No equivalent in 6.4x, so this is blank. See “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for more information. |

## Education Attributes

For more information regarding conversion of Education Attributes, see “The Raiser’s Edge 6 Post Conversion Utility” on page 19.

| RE 6.42 Field | RE 6.42 Location               | RE 7 Field                           | RE 7 Location                                                           | Comments |
|---------------|--------------------------------|--------------------------------------|-------------------------------------------------------------------------|----------|
| Category      | Bio 1 tab,<br>Education button | Attributes,<br>Category Column       | Anywhere there is<br>an Education<br>Record,<br>Attributes/Notes<br>tab |          |
| Description   | Bio 1 tab,<br>Education button | Attributes,<br>Description<br>Column | Anywhere there is<br>an Education<br>Record,<br>Attributes/Notes<br>tab |          |
| Comments      | Bio 1 tab,<br>Education button | Attributes,<br>Comments<br>Column    | Anywhere there is<br>an Education<br>Record,<br>Attributes/Notes<br>tab |          |
| N\A           | N\A                            | Notes                                | Anywhere there is<br>an Education<br>Record,<br>Attributes/Notes<br>tab |          |

## Employ Information

There is not an Employ button in *The Raiser’s Edge 7*. The Employ information is stored as a relationship in *The Raiser’s Edge 7* and is listed on the Relationship tab for a record.

| RE 6.42 Field | RE 6.42 Location            | RE 7 Field | RE 7 Location                                    | Comments                                            |
|---------------|-----------------------------|------------|--------------------------------------------------|-----------------------------------------------------|
| Name          | Bio 1 tab, Employ<br>button | Name       | Bio 1 tab, Business<br>button Or<br>Relationship |                                                     |
| N\A           | N\A                         | Address    | Bio 1 tab, Business<br>button Or<br>Relationship | No equivalent in<br>6.4x, so this field is<br>blank |
| City          | Bio 1 tab, Employ<br>button | City       | Bio 1 tab, Business<br>button Or<br>Relationship |                                                     |
| State         | Bio 1 tab, Employ<br>button | State      | Bio 1 tab, Business<br>button Or<br>Relationship |                                                     |

| RE 6.42 Field | RE 6.42 Location         | RE 7 Field                                | RE 7 Location                                                           | Comments                                                  |
|---------------|--------------------------|-------------------------------------------|-------------------------------------------------------------------------|-----------------------------------------------------------|
| Province      | Bio 1 tab, Employ button | Province                                  | Bio 1 tab, Business button Or Relationship                              | For Canadian version only.                                |
| N\A           | N\A                      | Zip                                       | Bio 1 tab, Business button Or Relationship                              | No equivalent in 6.4x, so this field is blank             |
| N\A           | N\A                      | Country                                   | Bio 1 tab, Business button Or Relationship, More button                 | No equivalent in 6.4x, so this field is blank             |
| N\A           | N\A                      | Send mail to this address                 | Bio 1 tab, Business button Or Relationship, More button                 | No equivalent in 6.4x, so this field is blank             |
| N\A           | N\A                      | Mail Attributes                           | Bio 1 tab, Business button Or Relationship, More button, Attributes tab | No equivalent in 6.4x, so this field is blank             |
| N\A           | N\A                      | Address type                              | Bio 1 tab, Business button Or Relationship, More button                 | For more information, see the “Address Types” on page 65. |
| N\A           | N\A                      | Info source                               | Bio 1 tab, Business button Or Relationship, More button                 | No equivalent in 6.4x, so this field is blank             |
| N\A           | N\A                      | County                                    | Bio 1 tab, Business button Or Relationship, More button                 | No equivalent in 6.4x, so this field is blank             |
| N\A           | N\A                      | Region                                    | Bio 1 tab, Business button Or Relationship, More button                 | No equivalent in 6.4x, so this field is blank             |
| N\A           | N\A                      | CART                                      | Bio 1 tab, Business button Or Relationship, More button                 | No equivalent in 6.4x, so this field is blank             |
| N\A           | N\A                      | Set this address to the preferred address | Bio 1 tab, Business button Or Relationship, More button                 | No equivalent in 6.4x, so this field is blank             |

| RE 6.42 Field | RE 6.42 Location         | RE 7 Field                           | RE 7 Location                                           | Comments                                          |
|---------------|--------------------------|--------------------------------------|---------------------------------------------------------|---------------------------------------------------|
| N\A           | N\A                      | Date from (for address)              | Bio 1 tab, Business button Or Relationship, More button | No equivalent in 6.4x, so this field is blank     |
| N\A           | N\A                      | Date to (for address)                | Bio 1 tab, Business button Or Relationship, More button | No equivalent in 6.4x, so this field is blank     |
| N\A           | N\A                      | Seasonal Address                     | Bio 1 tab, Business button Or Relationship, More button | No equivalent in 6.4x, so this field is blank     |
| N\A           | N\A                      | Seasonal from                        | Bio 1 tab, Business button Or Relationship, More button | No equivalent in 6.4x, so this field is blank     |
| N\A           | N\A                      | Seasonal to                          | Bio 1 tab, Business button Or Relationship, More button | No equivalent in 6.4x, so this field is blank     |
| N\A           | N\A                      | Phones                               | Bio 1 tab, Business button Or Relationship, More button | No equivalent in 6.4x, so this field is blank     |
| Phone         | Bio 1 tab, Employ button | Phones                               | Bio 1 tab, Business button Or Relationship, More button |                                                   |
| N\A           | N\A                      | Primary business information         | Bio 1 tab, Business button Or Relationship              | No equivalent in 6.4x, so this field is unmarked. |
| N\A           | N\A                      | Print organization name with address | Bio 1 tab, Business button Or Relationship              | No equivalent in 6.4x, so this field is unmarked. |
| Industry      | Bio 1 tab, Employ button | Industry                             | Bio 1 tab, Business button Or Relationship              |                                                   |
| Income Level  | Bio 1 tab, Employ button | Income                               | Bio 1 tab, Business button Or Relationship              |                                                   |
| Profession    | Bio 1 tab, Employ button | Profession                           | Bio 1 tab, Business button Or Relationship              |                                                   |

| RE 6.42 Field     | RE 6.42 Location         | RE 7 Field                            | RE 7 Location                                            | Comments                                      |
|-------------------|--------------------------|---------------------------------------|----------------------------------------------------------|-----------------------------------------------|
| Position          | Bio 1 tab, Employ button | Position                              | Bio 1 tab, Business button Or Relationship               |                                               |
| N\A               | N\A                      | Relationship                          | Bio 1 tab, Business button Or Relationship               | No equivalent in 6.4x, so this field is blank |
| N\A               | N\A                      | Reciprocal                            | Bio 1 tab, Business button Or Relationship               | No equivalent in 6.4x, so this field is blank |
| Org Matched Gifts | Bio 1 tab, Employ button | {Org} matches gifts for {Constituent} | Bio 1 tab, Business button Or Relationship, Matching tab |                                               |
| N\A               | N\A                      | Factor                                | Bio 1 tab, Business button Or Relationship, Matching tab | No equivalent in 6.4x, so this field is blank |
| N\A               | N\A                      | Fiscal year starts                    | Bio 1 tab, Business button Or Relationship, Matching tab | No equivalent in 6.4x, so this field is blank |
| N\A               | N\A                      | Maximum per gift                      | Bio 1 tab, Business button Or Relationship, Matching tab | No equivalent in 6.4x, so this field is blank |
| N\A               | N\A                      | Minimum per gift                      | Bio 1 tab, Business button Or Relationship, Matching tab | No equivalent in 6.4x, so this field is blank |
| N\A               | N\A                      | Maximum Annual per donor              | Bio 1 tab, Business button Or Relationship, Matching tab | No equivalent in 6.4x, so this field is blank |
| N\A               | N\A                      | Minimum annual per donor              | Bio 1 tab, Business button Or Relationship, Matching tab | No equivalent in 6.4x, so this field is blank |
| N\A               | N\A                      | Maximum total per donor               | Bio 1 tab, Business button Or Relationship, Matching tab | No equivalent in 6.4x, so this field is blank |

| RE 6.42 Field | RE 6.42 Location         | RE 7 Field                                            | RE 7 Location                                                    | Comments                                                                      |
|---------------|--------------------------|-------------------------------------------------------|------------------------------------------------------------------|-------------------------------------------------------------------------------|
| N\A           | N\A                      | Minimum total per donor                               | Bio 1 tab, Business button Or Relationship, Matching tab         | No equivalent in 6.4x, so this field is blank                                 |
| N\A           | N\A                      | Match notes                                           | Bio 1 tab, Business button Or Relationship, Matching tab         | No equivalent in 6.4x, so this field is blank                                 |
| N\A           | N\A                      | Employee                                              | Bio 1 tab, Business button Or Relationship                       | Since the constituent was once employed at this organization, this is marked. |
| N\A           | N\A                      | Contact                                               | Bio 1 tab, Business button Or Relationship                       | No equivalent in 6.4x, so this field is blank                                 |
| N\A           | N\A                      | Contact type                                          | Bio 1 tab, Business button Or Relationship                       | No equivalent in 6.4x, so this field is blank                                 |
| N\A           | N\A                      | Do not mail to this contact                           | Bio 1 tab, Business button Or Relationship                       | No equivalent in 6.4x, so this field is unmarked.                             |
| From Date     | Bio 1 tab, Employ button | Date from                                             | Bio 1 tab, Business button Or Relationship                       |                                                                               |
| To Date       | Bio 1 tab, Employ button | Date To                                               | Bio 1 tab, Business button Or Relationship                       |                                                                               |
| N\A           | N\A                      | Acknowledge this organization for hon/mem gifts       | Bio 1 tab, Business button Or Relationship                       | No equivalent in 6.4x, so this field is blank                                 |
| N\A           | N\A                      | Send to                                               | Bio 1 tab, Business button Or Relationship                       | No equivalent in 6.4x, so this field is blank                                 |
| N\A           | N\A                      | Automatically soft credit this organization for gifts | Bio 1 tab, Business button Or Relationship                       | No equivalent in 6.4x, so this field is blank                                 |
| N\A           | N\A                      | Attributes/Notes                                      | Bio 1 tab, Business button Or Relationship, Attributes/Notes tab | No equivalent in 6.4x, so this field is blank                                 |

## Constituency Codes

For more information regarding the conversion of constituency codes, see “The Raiser’s Edge 6 Post Conversion Utility” on page 19.

| RE 6.42 Field                   | RE 6.42 Location | RE 7 Field                     | RE 7 Location                                                 | Comments |
|---------------------------------|------------------|--------------------------------|---------------------------------------------------------------|----------|
| Constituency Grid – Code        | Bio 2 tab        | Constituency Grid - Code       | Bio 2 tab or Org 2 tab. Constituency Grid, Code column        |          |
| Constituency Grid – Description | Bio 2 tab        | Constituency Grid -Description | Bio 2 tab or Org 2 tab. Constituency Grid, Description column |          |
| Constituency Grid – Date From   | Bio 2 tab        | Constituency Grid - Date From  | Bio 2 tab or Org 2 tab. Constituency Grid, Date From column   |          |
| Constituency Grid – Date To     | Bio 2 tab        | Constituency Grid - Date To    | Bio 2 tab or Org 2 tab. Constituency Grid, Date To column     |          |

## Spouse Information for Individual Records

Spouses are considered relationships in *The Raiser’s Edge 7*. However, the spouse information can be viewed from the Bio 1 tab of the Individual’s record by clicking on the spouse button.

| RE 6.42 Field | RE 6.42 Location | RE 7 Field | RE 7 Location                                               | Comments                                                                                                                                                                                                                                                        |
|---------------|------------------|------------|-------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Last Name     | Spouse tab       | Name       | Bio 1 tab, Spouse button or Relationships tab General 1 tab | Click the Name button for all name fields. Spouse Last name is required in version 7, but not in 6.4x. If Spouse Last name is blank in 6.4x, but other spouse information is present, the constituent’s Last name is used as the Spouse Last name in version 7. |
| First Name    | Spouse tab       | Name       | Bio 1 tab, Spouse button or Relationships tab General 1 tab | Click the Name button for all name fields                                                                                                                                                                                                                       |

| RE 6.42 Field | RE 6.42 Location | RE 7 Field                    | RE 7 Location                                               | Comments                                                                                                                                                                                                |
|---------------|------------------|-------------------------------|-------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Middle Name   | Spouse tab       | Name                          | Bio 1 tab, Spouse button or Relationships tab General 1 tab | Click the Name button for all name fields                                                                                                                                                               |
| Title 1       | Spouse tab       | Name                          | Bio 1 tab, Spouse button or Relationships tab General 1 tab | Click the Name button for all name fields                                                                                                                                                               |
| Title 2       | Spouse tab       | Name                          | Bio 1 tab, Spouse button or Relationships tab General 1 tab | Click the Name button for all name fields                                                                                                                                                               |
| Suffix 1      | Spouse tab       | Name                          | Bio 1 tab, Spouse button or Relationships tab General 1 tab | Click the Name button for all name fields                                                                                                                                                               |
| Suffix 2      | Spouse tab       | Name                          | Bio 1 tab, Spouse button or Relationships tab General 1 tab | Click the Name button for all name fields                                                                                                                                                               |
| N\A           | N\A              | This individual is the spouse | Relationship tab                                            | See “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for more information.                                                                                                                      |
| N\A           | N\A              | Address                       | Relationship tab                                            | If the spouse has their own record in 6.4x, then the spouse’s preferred address converts. If the spouse does not have their own record in 6.4x, then the preferred address of the constituent converts. |



| RE 6.42 Field   | RE 6.42 Location | RE 7 Field   | RE 7 Location                                                  | Comments                                                                                                                                                                                                                                                          |
|-----------------|------------------|--------------|----------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| N\A             | N\A              | Phones       | Relationship tab                                               | If the spouse has their own record in 6.4x, then phone numbers associated with the spouse's preferred address convert. If the spouse does not have their own record in 6.4x, then phone numbers associated with the preferred address of the constituent convert. |
| Nickname        | Spouse tab       | Nickname     | Bio 1 tab, Spouse button or Relationships tab<br>General 1 tab |                                                                                                                                                                                                                                                                   |
| Maiden Name     | Spouse tab       | Maiden name  | Bio 1 tab, Spouse button or Relationships tab<br>General 1 tab |                                                                                                                                                                                                                                                                   |
| N\A             | N\A              | Relationship | Bio 1 tab, Spouse button or Relationships tab<br>General 1 tab | No equivalent in 6.4x, so this field is blank                                                                                                                                                                                                                     |
| N\A             | N\A              | Reciprocal   | Bio 1 tab, Spouse button or Relationships tab<br>General 1 tab | No equivalent in 6.4x, so this field is blank                                                                                                                                                                                                                     |
| N\A             | N\A              | Date from    | Bio 1 tab, Spouse button or Relationships tab<br>General 1 tab | No equivalent in 6.4x, so this field is blank                                                                                                                                                                                                                     |
| N\A             | N\A              | To           | Bio 1 tab, Spouse button or Relationships tab<br>General 1 tab | No equivalent in 6.4x, so this field is blank                                                                                                                                                                                                                     |
| Social Security | Spouse tab       | SSN          | Bio 1 tab, Spouse button or Relationships tab<br>General 2 tab |                                                                                                                                                                                                                                                                   |
| Date of Birth   | Spouse tab       | Birthdate    | Bio 1 tab, Spouse button or Relationships tab<br>General 2 tab |                                                                                                                                                                                                                                                                   |

| RE 6.42 Field               | RE 6.42 Location            | RE 7 Field                                          | RE 7 Location                                               | Comments                                                                                                                             |
|-----------------------------|-----------------------------|-----------------------------------------------------|-------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|
| N\A                         | N\A                         | Deceased?                                           | Bio 1 tab, Spouse button or Relationships tab General 2 tab | If there is a date in the Deceased date field on the Bio 2 tab in 6.4x, this checkbox is marked.                                     |
| Deceased                    | Spouse tab                  | Date                                                | Bio 1 tab, Spouse button or Relationships tab General 2 tab | If the Deceased? Checkbox is marked, indicating yes, then the Deceased Date is enabled.                                              |
| Sex                         | Spouse tab                  | Gender                                              | Bio 1 tab, Spouse button or Relationships tab General 2 tab |                                                                                                                                      |
| Acknowledge Hon/Mem Gifts   | Spouse tab                  | Acknowledge this individual for hon/mem gifts       | Bio 1 tab, Spouse button or Relationships tab General 1 tab |                                                                                                                                      |
| N\A                         | N\A                         | This individual is head of household                | Bio 1 tab, Spouse button or Relationships tab General 2 tab | No equivalent in 6.4x, so this field is unmarked. See “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for more information. |
| N\A                         | N\A                         | Automatically soft credit this individual for gifts | Bio 1 tab, Spouse button or Relationships tab General 2 tab | In Configuration in 6.4x, if Automatically soft credit spouses is marked, this checkbox is also marked.                              |
| Business button Information | Spouse tab, Business button | Business button                                     | Bio 1 tab, Spouse button or Relationships tab General 1 tab | See “Business Information for Individuals” on page 78 for more information.                                                          |
| Employ button Information   | Spouse tab, Employ button   | Business button                                     | Bio 1 tab, Spouse button or Relationships tab General 1 tab | See “Employ Information” on page 86 for more information.                                                                            |

| RE 6.42 Field    | RE 6.42 Location             | RE 7 Field                                                  | RE 7 Location                                               | Comments                                                                                                               |
|------------------|------------------------------|-------------------------------------------------------------|-------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------|
| Education button | Spouse tab, Education button | Education button                                            | Bio 1 tab, Spouse button or Relationships tab General 1 tab | For more information, see “Education Information” on page 84.                                                          |
| N\A              | N\A                          | Primary addressee                                           | Bio 1 tab, Spouse button or Relationships tab General 2 tab | If the spouse is a constituent in 6.4x, then this information is selected from the Add/Sal tab. If not, this is blank. |
| N\A              | N\A                          | Editable?                                                   | Bio 1 tab, Spouse button or Relationships tab General 2 tab | No equivalent in 6.4x, so this is unmarked.                                                                            |
| N\A              | N\A                          | Primary salutation                                          | Bio 1 tab, Spouse button or Relationships tab General 2 tab | If the spouse is a constituent in 6.4x, then this information is selected from the Add/Sal tab. If not, this is blank. |
| N\A              | N\A                          | Editable?                                                   | Bio 1 tab, Spouse button or Relationships tab General 2 tab | No equivalent in 6.4x, so this is unmarked.                                                                            |
| N\A              | N\A                          | Additional Addressee/Salutations Grid. Editable             | Bio 1 tab, Spouse button or Relationships tab General 2 tab | No equivalent in 6.4x, so this is unmarked.                                                                            |
| N\A              | N\A                          | Additional Addressee/Salutations Grid. Type                 | Bio 1 tab, Spouse button or Relationships tab General 2 tab | If the spouse is a constituent in 6.4x, then this information is selected from the Add/Sal tab. If not, this is blank. |
| N\A              | N\A                          | Additional Addressee/Salutations Grid. Addressee/Salutation | Bio 1 tab, Spouse button or Relationships tab General 2 tab | If the spouse is a constituent in 6.4x, then this information is selected from the Add/Sal tab. If not, this is blank. |

| RE 6.42 Field | RE 6.42 Location | RE 7 Field | RE 7 Location                                                                            | Comments                                       |
|---------------|------------------|------------|------------------------------------------------------------------------------------------|------------------------------------------------|
| N\A           | N\A              | Attributes | Bio 1 tab, Spouse button or Relationships tab, Relationship record, Attributes/Notes tab | No equivalent for this in 6.4x, this is blank. |
| N\A           | N\A              | Notes      | Bio 1 tab, Spouse button or Relationships tab, Relationship record, Attributes/Notes tab | No equivalent for this in 6.4x, this is blank. |

## Contact Information on Organization Records

There is not a separate Contact tab on the Organization record. All Contacts are stored on the Relationship tab as an Individual on the Organization record.

| RE 6.42 Field                  | RE 6.42 Location | RE 7 Field                       | RE 7 Location               | Comments                                       |
|--------------------------------|------------------|----------------------------------|-----------------------------|------------------------------------------------|
| Last Name                      | Contact tab      | Name                             | Relationship tab            |                                                |
| First Name                     | Contact tab      | Name                             | Relationship tab            |                                                |
| Middle Name                    | Contact tab      | Name                             | Relationship tab            |                                                |
| Title 1                        | Contact tab      | Name                             | Relationship tab            |                                                |
| Title 2                        | Contact tab      | Name                             | Relationship tab            |                                                |
| Suffix 1                       | Contact tab      | Name                             | Relationship tab            |                                                |
| Suffix 2                       | Contact tab      | Name                             | Relationship tab            |                                                |
| Nickname                       | Contact tab      | Nickname                         | Relationship tab            |                                                |
| N\A                            | N\A              | Maiden name                      | Relationship tab, General 2 | No equivalent for this in 6.4x, this is blank. |
| N\A                            | N\A              | Gender                           | Relationship tab, General 2 |                                                |
| N\A                            | N\A              | Contact checkbox                 | Relationship tab            |                                                |
| Type                           | Contact tab      | Contact type                     | Relationship tab            |                                                |
| Contact Address – Mail to Send | Contact tab      | Do not send mail to this contact | Relationship tab            |                                                |

| RE 6.42 Field                   | RE 6.42 Location | RE 7 Field                                | RE 7 Location                 | Comments                                                                      |
|---------------------------------|------------------|-------------------------------------------|-------------------------------|-------------------------------------------------------------------------------|
| Contact Address – Address Block | Contact tab      | Address                                   | Relationship tab, More button |                                                                               |
| Contact Address – City          | Contact tab      | City                                      | Relationship tab, More button |                                                                               |
| Contact Address – State         | Contact tab      | State                                     | Relationship tab, More button |                                                                               |
| Contact Address – Zip Code      | Contact tab      | ZIP                                       | Relationship tab, More button |                                                                               |
| Contact Address – Country       | Contact tab      | Country                                   | Relationship tab, More button |                                                                               |
| Contact Address – Type          | Contact tab      | Address type                              | Relationship tab, More button | For more information, see the “Address Types” on page 65.                     |
| Contact Address – Info Source   | Contact tab      | Info source                               | Relationship tab, More button |                                                                               |
| Contact Address – County        | Contact tab      | County                                    | Relationship tab, More button |                                                                               |
| Contact Address – Region        | Contact tab      | Region                                    | Relationship tab, More button |                                                                               |
| Contact Address – CART          | Contact tab      | CART                                      | Relationship tab, More button |                                                                               |
| N\A                             | N\A              | Set this address to the preferred address | Relationship tab, More button |                                                                               |
| Contact Address – Date From     | Contact tab      | Valid Dates, Date from                    | Relationship tab, More button |                                                                               |
| Contact Address – Date To       | Contact tab      | Valid Dates, Date to                      | Relationship tab, More button |                                                                               |
| N\A                             | N\A              | Seasonal Address                          | Relationship tab, More button | This checkbox is marked if seasonal to or from information is present in 6.x. |

| RE 6.42 Field                   | RE 6.42 Location | RE 7 Field                           | RE 7 Location                                       | Comments                                  |
|---------------------------------|------------------|--------------------------------------|-----------------------------------------------------|-------------------------------------------|
| Contact Address – Seasonal From | Contact tab      | N\A                                  | N\A                                                 | This field has been removed in version 7. |
| Contact Address – Seasonal To   | Contact tab      | N\A                                  | N\A                                                 | This field has been removed in version 7. |
| Contact Address – Mail to Send  | Contact tab      | Send mail to this address            | Relationship tab, More button                       |                                           |
| Contact Address – Type of Mail  | Contact tab      | Mail Attributes                      | Relationship tab, More button, Attributes/Notes tab |                                           |
| Phone(s)                        | Contact tab      | Phones                               | Relationship tab                                    |                                           |
| Print Org Name                  | Contact tab      | Print organization name with address | Relationship tab                                    |                                           |
| Position                        | Contact tab      | Position                             | Relationship tab                                    |                                           |
| Print Position                  | Contact tab      | Print?                               | Relationship tab                                    |                                           |
| Profession                      | Contact tab      | Profession                           | Relationship tab                                    |                                           |
| N\A                             | N\A              | Relationship                         | Relationship tab                                    |                                           |
| N\A                             | N\A              | Reciprocal                           | Relationship tab                                    |                                           |
| N\A                             | N\A              | Date from                            | Relationship tab                                    |                                           |
| N\A                             | N\A              | Date to                              | Relationship tab                                    |                                           |
| N\A                             | N\A              | Education button                     | Relationship tab                                    |                                           |
| N\A                             | N\A              | SSN                                  | Relationship tab                                    |                                           |
| N\A                             | N\A              | Birthdate                            | Relationship tab                                    |                                           |
| N\A                             | N\A              | Deceased?                            | Relationship tab, General 2                         |                                           |
| N\A                             | N\A              | Deceased Date                        | Relationship tab, General 2                         |                                           |
| N\A                             | N\A              | Employee                             | Relationship tab                                    |                                           |
| N\A                             | N\A              | Primary business information         | Relationship tab                                    |                                           |

| RE 6.42 Field                                      | RE 6.42 Location | RE 7 Field                                          | RE 7 Location                          | Comments                                                                           |
|----------------------------------------------------|------------------|-----------------------------------------------------|----------------------------------------|------------------------------------------------------------------------------------|
| N\A                                                | N\A              | Acknowledge this individual for hon/mem gifts       | Relationship tab                       |                                                                                    |
| N\A                                                | N\A              | Automatically soft credit this individual for gifts | Relationship tab                       |                                                                                    |
| Contact Addressee/Salutation Grid – Add/Sal column | Contact tab      | Primary addressee                                   | Relationship tab, General 2            | See “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for more information. |
| N\A                                                | N\A              | Editable                                            | Relationship tab, General 2            |                                                                                    |
| Contact Addressee/Salutation Grid – Add/Sal column | Contact tab      | Primary salutation                                  | Relationship tab, General 2            | See “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for more information. |
| N\A                                                | N\A              | Editable                                            | Relationship tab, General 2            |                                                                                    |
| Contact Addressee/Salutation Grid – Type           | Contact tab      | Addressees and Salutations Grid.Type                | Relationship tab, General 2            | See “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for more information. |
| N\A                                                | N\A              | Attributes/Notes tab                                | Relationship tab, Attributes/Notes tab |                                                                                    |

## Addressees/Salutations for Individuals

| RE 6.42 Field                        | RE 6.42 Location | RE 7 Field                           | RE 7 Location              | Comments                                                  |
|--------------------------------------|------------------|--------------------------------------|----------------------------|-----------------------------------------------------------|
| Primary Addressee                    | Addr/Sal tab     | Primary Addressee                    | Addressees/Salutations tab |                                                           |
| Primary Salutation                   | Addr/Sal tab     | Primary Salutation                   | Addressees/Salutations tab |                                                           |
| Additional Addressee/Salutation      | Addr/Sal tab     | Additional Addressee/Salutation      | Addressees/Salutations tab |                                                           |
| Additional Addressee/Salutation Type | Addr/Sal tab     | Additional Addressee/Salutation Type | Addressees/Salutations tab | For more information, see the “Address Types” on page 65. |
| N\A                                  | N\A              | Editable?                            | Addressees/Salutations tab |                                                           |

## Relationship Information

| RE 6.42 Field | RE 6.42 Location | RE 7 Field                    | RE 7 Location    | Comments                                                        |
|---------------|------------------|-------------------------------|------------------|-----------------------------------------------------------------|
| Last Name     | Relationship tab | Last name                     | Relationship tab |                                                                 |
| First Name    | Relationship tab | First name                    | Relationship tab |                                                                 |
| Middle Name   | Relationship tab | Middle name                   | Relationship tab |                                                                 |
| Titles 1      | Relationship tab | Title 1                       | Relationship tab |                                                                 |
| Titles 2      | Relationship tab | Title 2                       | Relationship tab |                                                                 |
| Suffixes 1    | Relationship tab | Suffix 1                      | Relationship tab |                                                                 |
| Suffixes 2    | Relationship tab | Suffix 2                      | Relationship tab |                                                                 |
| N\A           | N\A              | This individual is the spouse | Relationship tab | This is marked if the information converts from the Spouse tab. |
| N\A           | N\A              | Address                       | Relationship tab |                                                                 |
| N\A           | N\A              | Phones                        | Relationship tab |                                                                 |
| Nickname      | Relationship tab | Nickname                      | Relationship tab |                                                                 |
| Maiden Name   | Relationship tab | Maiden name                   | Relationship tab |                                                                 |



| RE 6.42 Field | RE 6.42 Location | RE 7 Field                 | RE 7 Location                          | Comments                                                                                                                                                                                                                                                                                                                                                                   |
|---------------|------------------|----------------------------|----------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Date of Birth | Relationship tab | Birthdate                  | Relationship tab, General 2            |                                                                                                                                                                                                                                                                                                                                                                            |
| N\A           | N\A              | Deceased checkbox          | Relationship tab, General 2            |                                                                                                                                                                                                                                                                                                                                                                            |
| Deceased      | Relationship tab | Date                       | Relationship tab, General 2            |                                                                                                                                                                                                                                                                                                                                                                            |
| Sex           | Relationship tab | Gender                     | Relationship tab, General 2            |                                                                                                                                                                                                                                                                                                                                                                            |
| N\A           | N\A              | SSN                        | Relationship tab, General 2            |                                                                                                                                                                                                                                                                                                                                                                            |
| Relationship  | Relationship tab | Relationship               | Relationship tab                       |                                                                                                                                                                                                                                                                                                                                                                            |
| Reciprocal    | Relationship tab | Reciprocal                 | Relationship tab                       |                                                                                                                                                                                                                                                                                                                                                                            |
| N\A           | N\A              | Date from                  | Relationship tab                       |                                                                                                                                                                                                                                                                                                                                                                            |
| N\A           | N\A              | Date To                    | Relationship tab                       |                                                                                                                                                                                                                                                                                                                                                                            |
| Notes         | Relationship tab | Notes                      | Relationship tab, Attributes/Notes tab |                                                                                                                                                                                                                                                                                                                                                                            |
| N\A           | N\A              | School name                | Relationship tab, Education button     | No equivalent for this in 6.4x. If the constituent has a primary school listed in their record, this information will convert as primary alumni information. Any additional schools will be listed on the relationship record. If the constituent does not have a primary school listed in their records, their school information will be listed on the relationship tab. |
| N\A           | N\A              | Primary alumni information | Relationship tab, Education button     | For more information, see the <i>Conversion Planning Guide</i> .                                                                                                                                                                                                                                                                                                           |

| RE 6.42 Field                | RE 6.42 Location | RE 7 Field                                          | RE 7 Location                         | Comments                              |
|------------------------------|------------------|-----------------------------------------------------|---------------------------------------|---------------------------------------|
| N\A                          | N\A              | Type                                                | Relationship tab,<br>Education button |                                       |
| N\A                          | N\A              | Campus                                              | Relationship tab,<br>Education button |                                       |
| N\A                          | N\A              | Known name                                          | Relationship tab,<br>Education button |                                       |
| N\A                          | N\A              | Degree                                              | Relationship tab,<br>Education button |                                       |
| N\A                          | N\A              | GPA                                                 | Relationship tab,<br>Education button |                                       |
| Class Of                     | Relationship tab | Class of                                            | Relationship tab,<br>Education button | Available only for<br><i>RE:Alum.</i> |
| Date Entered                 | Relationship tab | Date entered                                        | Relationship tab,<br>Education button | Available only for<br><i>RE:Alum.</i> |
| Date Left                    | Relationship tab | Date left                                           | Relationship tab,<br>Education button | Available only for<br><i>RE:Alum.</i> |
| N\A                          | N\A              | Status                                              | Relationship tab,<br>Education button |                                       |
| Date Graduated               | Relationship tab | Date graduated                                      | Relationship tab,<br>Education button | Available only for<br><i>RE:Alum.</i> |
| Frat/Sorority                | Relationship tab | Frat/Sorority                                       | Relationship tab,<br>Education button | Available only for<br><i>RE:Alum.</i> |
| N\A                          | N\A              | Business button                                     | Relationship tab,<br>Business button  |                                       |
| Acknowledge<br>Hon/Mem Gifts | Relationship tab | Acknowledge this<br>individual for<br>hon/mem gifts | Relationship tab                      |                                       |

| RE 6.42 Field | RE 6.42 Location | RE 7 Field                                          | RE 7 Location               | Comments                                                                                                                                                                                                                                               |
|---------------|------------------|-----------------------------------------------------|-----------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| N\A           | N\A              | This individual is head of household                | Relationship tab            | No equivalent for this in 6.4x. For spousal relationships between constituents, the “head of household” is chosen at random; for spousal relationships between a constituent and a non-constituent, the “head of household” is always the constituent. |
| N\A           | N\A              | Automatically soft credit this individual for gifts | Relationship tab            |                                                                                                                                                                                                                                                        |
| N\A           | N\A              | Primary addressee                                   | Relationship tab, General 2 | See “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for more information.                                                                                                                                                                     |
| N\A           | N\A              | Editable                                            | Relationship tab, General 2 |                                                                                                                                                                                                                                                        |
| N\A           | N\A              | Primary salutation                                  | Relationship tab, General 2 | See “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for more information.                                                                                                                                                                     |
| N\A           | N\A              | Editable                                            | Relationship tab, General 2 |                                                                                                                                                                                                                                                        |
| N\A           | N\A              | Type                                                | Relationship tab, General 2 | No equivalent in 6.4x for relationships. Contacts did have addressee/salutation information. See “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for more information.                                                                        |
| N\A           | N\A              | Addressee/ Salutation                               | Relationship tab, General 2 |                                                                                                                                                                                                                                                        |

## Affiliation Information

Affiliations are converted as Relationships and located on the relationship tab in *The Raiser's Edge 7*.

| RE 6.42 Field             | RE 6.42 Location | RE 7 Field                                      | RE 7 Location                          | Comments |
|---------------------------|------------------|-------------------------------------------------|----------------------------------------|----------|
| Organization              | Affiliation tab  | Name                                            | Relationship tab                       |          |
| N\A                       | N\A              | Primary business information                    | Relationship tab                       |          |
| N\A                       | N\A              | Address                                         | Relationship tab                       |          |
| N\A                       | N\A              | Phones                                          | Relationship tab                       |          |
| N\A                       | N\A              | Print organization name with address            | Relationship tab                       |          |
| N\A                       | N\A              | Industry                                        | Relationship tab                       |          |
| N\A                       | N\A              | Position                                        | Relationship tab                       |          |
| N\A                       | N\A              | Profession                                      | Relationship tab                       |          |
| N\A                       | N\A              | Income                                          | Relationship tab                       |          |
| Affiliation               | Affiliation tab  | Relationship                                    | Relationship tab                       |          |
| From Date                 | Affiliation tab  | From date                                       | Relationship tab                       |          |
| To Date                   | Affiliation tab  | Date To                                         | Relationship tab                       |          |
| Reciprocal Type           | Affiliation tab  | Contact type                                    | Relationship tab                       |          |
| Reciprocal                | Affiliation tab  | Reciprocal                                      | Relationship tab                       |          |
| N\A                       | N\A              | Employee                                        | Relationship tab                       |          |
| N\A                       | N\A              | Contact                                         | Relationship tab                       |          |
| N\A                       | N\A              | Do not mail to this contact                     | Relationship tab                       |          |
| Notes                     | Affiliation tab  | Notes                                           | Relationship tab, Attributes/Notes tab |          |
| Acknowledge Hon/Mem Gifts | Affiliation tab  | Acknowledge this organization for hon/mem gifts | Relationship tab                       |          |
| Contact                   | Affiliation tab  | Send to                                         | Relationship tab                       |          |

| RE 6.42 Field | RE 6.42 Location | RE 7 Field                                      | RE 7 Location                  | Comments |
|---------------|------------------|-------------------------------------------------|--------------------------------|----------|
| N\A           | N\A              | Automatically soft credit this organization     | Relationship tab               |          |
| N\A           | N\A              | {Org name} matches gifts from {Individual name} | Relationship tab, Matching tab |          |
| N\A           | N\A              | Factor                                          | Relationship tab, Matching tab |          |
| N\A           | N\A              | Maximum Per gift                                | Relationship tab, Matching tab |          |
| N\A           | N\A              | Minimum Per gift                                | Relationship tab, Matching tab |          |
| N\A           | N\A              | Maximum Annual per donor                        | Relationship tab, Matching tab |          |
| N\A           | N\A              | Minimum Annual per donor                        | Relationship tab, Matching tab |          |
| N\A           | N\A              | Maximum Total per donor                         | Relationship tab, Matching tab |          |
| N\A           | N\A              | Minimum Total per donor.                        | Relationship tab, Matching tab |          |
| N\A           | N\A              | Match notes                                     | Relationship tab, Matching tab |          |

## Constituent Appeal Information

| RE 6.42 Field | RE 6.42 Location | RE 7 Field  | RE 7 Location | Comments |
|---------------|------------------|-------------|---------------|----------|
| Description   | Appeals tab      | Description | Appeals tab   |          |
| Appeal ID     | Appeals tab      | Appeal ID   | Appeals tab   |          |
| Comments      | Appeals tab      | Comments    | Appeals tab   |          |
| Date          | Appeals tab      | Date        | Appeals tab   |          |
| N\A           | N\A              | Response    | Appeals tab   |          |
| N\A           | N\A              | Total Given | Appeals tab   |          |

## Constituent Notepad Information

| RE 6.42 Field | RE 6.42 Location | RE 7 Field  | RE 7 Location | Comments                                                    |
|---------------|------------------|-------------|---------------|-------------------------------------------------------------|
| Type          | Notes tab        | Type        | Notes tab     |                                                             |
| Description   | Notes tab        | Description | Notes tab     |                                                             |
| Date          | Notes tab        | Date        | Notes tab     |                                                             |
| N\A           | N\A              | Title       | Notes tab     |                                                             |
| Notes         | Notes tab        | Notes       | Notes tab     |                                                             |
| N\A           | N\A              | Author      | Notes tab     | This defaults to the user who added the constituent record. |

## Gift Information

| RE 6.42 Field | RE 6.42 Location | 7. 0 Field | 7 Location | Comments |
|---------------|------------------|------------|------------|----------|
| Type of Gift  | Gifts tab        | Gift type  | Gifts tab  |          |
| Fund          | Gifts tab        | Fund       | Gifts tab  |          |
| Campaign      | Gifts tab        | Campaign   | Gifts tab  |          |
| Amount        | Gifts tab        | Amount     | Gifts tab  |          |
| Appeal        | Gifts tab        | Appeal     | Gifts tab  |          |

| RE 6.42 Field       | RE 6.42 Location           | RE 7 Field                                           | RE 7 Location              | Comments |
|---------------------|----------------------------|------------------------------------------------------|----------------------------|----------|
| Date                | Gifts tab                  | Gift date                                            | Gifts tab                  |          |
| Reference           | Gifts tab                  | Reference                                            | Gifts tab                  |          |
| Letter              | Gifts tab                  | Letter                                               | Gifts tab                  |          |
| N\A                 | N\A                        | Letter button                                        | Gifts tab                  |          |
| N\A                 | N\A                        | Letter Date                                          | Gifts tab                  |          |
| # Pays              | Gifts tab                  | No. installments                                     | Gifts tab                  |          |
| Frequency           | Gifts tab                  | Frequency                                            | Gifts tab, Schedule button |          |
| 1 <sup>st</sup> Pay | Gifts tab                  | Starting on                                          | Gifts tab, Schedule button |          |
| N\A                 | N\A                        | Ending                                               | Gifts tab, Schedule button |          |
| N\A                 | N\A                        | Day                                                  | Gifts tab, Schedule button |          |
| N\A                 | N\A                        | Of every XX months                                   | Gifts tab, Schedule button |          |
| N\A                 | N\A                        | The (first second third.)                            | Gifts tab, Schedule button |          |
| N\A                 | N\A                        | Day (Sunday, Monday, Tuesday)                        | Gifts tab, Schedule button |          |
| N\A                 | N\A                        | On                                                   | Gifts tab, Schedule button |          |
| N\A                 | N\A                        | Number                                               | Gifts tab, Schedule button |          |
| N\A                 | N\A                        | Every                                                | Gifts tab, Schedule button |          |
| N\A                 | N\A                        | Weeks on Sat., Sun., Mon., Tues., Wed., Thurs., Fri. | Gifts tab, Schedule button |          |
| N\A                 | N\A                        | Do not show paid installments                        | Gifts tab, Schedule button |          |
| Amount Due          | Gifts tab, Installment tab | Amount                                               | Gifts tab, Schedule button |          |
| Date Due            | Gift tab, Installment tab  | Date                                                 | Gifts tab, Schedule button |          |

| RE 6.42 Field         | RE 6.42 Location   | RE 7 Field                          | RE 7 Location             | Comments |
|-----------------------|--------------------|-------------------------------------|---------------------------|----------|
| Post Status           | Gift tab, Misc tab | Installment post status             |                           |          |
| Solicitor/Canvasser   | Gifts tab          | Solicitor(s) Grid, Solicitor        | Gifts tab                 |          |
| N\A                   | N\A                | Solicitor(s) Grid, Amount           | Gifts tab                 |          |
| Acknowledge           | Gifts tab          | Acknowledge                         | Gifts tab                 |          |
| N\A                   | N\A                | Acknowledge date                    | Gifts tab                 |          |
| Receipt               | Gifts tab          | Receipt                             | Gifts tab                 |          |
| Receipt #             | Gifts tab          | Receipt no                          | Gifts tab                 |          |
| Receipt Amt           | Gifts tab          | Receipt amt                         | Gifts tab                 |          |
| N\A                   | N\A                | Receipt date                        | Gifts tab                 |          |
| N\A                   | N\A                | Benefits Grid, Benefits             | Gifts tab                 |          |
| N\A                   | N\A                | Benefits Grid, Count                | Gifts tab                 |          |
| N\A                   | N\A                | Benefits Grid, Unit Cost            | Gifts tab                 |          |
| N\A                   | N\A                | Benefits Grid, Total Benefit Value  | Gifts tab                 |          |
| N\A                   | N\A                | Sent/Fulfilled                      | Gifts tab                 |          |
| N\A                   | N\A                | Comments                            | Gifts tab                 |          |
| Send Pledge Reminders | Gifts tab          | Send pledge reminders               | Gifts tab                 |          |
| N\A                   | N\A                | Reminder history Sent On            | Gifts tab, History button |          |
| N\A                   | N\A                | Reminder history Sent for           | Gifts tab, History button |          |
| N\A                   | N\A                | Reminder history Installment Due On | Gifts tab, History button |          |
| N\A                   | N\A                | Reminder history Installment amount | Gifts tab, History button |          |



| RE 6.42 Field          | RE 6.42 Location    | RE 7 Field                       | RE 7 Location             | Comments                                                                                                        |
|------------------------|---------------------|----------------------------------|---------------------------|-----------------------------------------------------------------------------------------------------------------|
| N\A                    | N\A                 | Reminder history current balance | Gifts tab, History button |                                                                                                                 |
| N\A                    | N\A                 | Gift ID                          | Gifts tab, Misc tab       |                                                                                                                 |
| Constituency           | Gifts tab, Misc tab | Constituency                     | Gifts tab, Misc tab       |                                                                                                                 |
| Gift Code              | Gifts tab, Misc tab | Gift code                        | Gifts tab, Misc tab       |                                                                                                                 |
| Post Status            | Gifts tab, Misc tab | GL post status                   | Gifts tab, Misc tab       |                                                                                                                 |
| Post Date              | Gifts tab, Misc tab | GL post date                     | Gifts tab, Misc tab       |                                                                                                                 |
| Gift Given Anonymously | Gifts tab, Misc tab | Gift is anonymous                | Gifts tab, Misc tab       |                                                                                                                 |
| Notes                  | Gifts tab, Misc tab | Notes                            | Gifts tab, Misc tab       |                                                                                                                 |
| N\A                    | N\A                 | Notepad Type                     | Gifts tab, Misc tab       | RE7-Conversion                                                                                                  |
| N\A                    | N\A                 | Notes Date                       | Gifts tab, Misc tab       | Date of note in 6.4x.                                                                                           |
| N\A                    | N\A                 | Notes Title                      | Gifts tab, Misc tab       |                                                                                                                 |
| N\A                    | N\A                 | Notes Author                     | Gifts tab, Misc tab       | Defaults in as user who added gift in 6.4x.                                                                     |
| N\A                    | N\A                 | Notes Description                | Gifts tab, Misc tab       | If gift is linked to an EFT record in 6.4x, description is RE7 Conversion- EFT Notes. Otherwise, this is blank. |
| Proposal               | Gifts tab, Misc tab | Purpose                          | Gifts tab                 | For more information about the proposal fields, see "Prospect Research" on page 136.                            |
| N\A                    | N\A                 | Proposal For                     | Gifts tab                 | For more information about the proposal fields, see "Prospect Research" on page 136.                            |

| RE 6.42 Field  | RE 6.42 Location    | RE 7 Field     | RE 7 Location | Comments                                                                                                                  |
|----------------|---------------------|----------------|---------------|---------------------------------------------------------------------------------------------------------------------------|
| N\A            | N\A                 | Proposal Name  | Gifts tab     | For more information about the proposal fields, see “Prospect Research” on page 136.                                      |
| N\A            | N\A                 | Status         | Gifts tab     | For more information about the proposal fields, see “Prospect Research” on page 136.                                      |
| N\A            | N\A                 | Deadline       | Gifts tab     | For more information about the proposal fields, see “Prospect Research” on page 136.                                      |
| N\A            | N\A                 | Amount Applied | Gifts tab     | With <i>Prospect Research Management</i> , the full amount of the gift from the proposal record defaults into this field. |
| Payment Type   | Gifts tab, Misc tab | Pay method     | Gifts tab     |                                                                                                                           |
| Reference #    | Gifts tab, Misc tab | Reference no.  | Gifts tab     |                                                                                                                           |
| Reference Date | Gifts tab, Misc tab | Reference date | Gifts tab     |                                                                                                                           |
| Bank Name      | Gifts tab, Misc tab | Bank name      | Gifts tab     | For more information about the fields associated with the Bank record, see “Constituent Bank Information” on page 76.     |
| N\A            | N\A                 | Amount bills   | Gifts tab     |                                                                                                                           |
| N\A            | N\A                 | Amount coins   | Gifts tab     |                                                                                                                           |
| Check Number   | Gifts tab, Misc tab | Check no.      | Gifts tab     |                                                                                                                           |
| Check Date     | Gifts tab, Misc tab | Date           | Gifts tab     |                                                                                                                           |
| Credit Type    | Gifts tab, Misc tab | Card type      | Gifts tab     |                                                                                                                           |

| RE 6.42 Field           | RE 6.42 Location           | RE 7 Field               | RE 7 Location                  | Comments |
|-------------------------|----------------------------|--------------------------|--------------------------------|----------|
| Card Number             | Gifts tab, Misc tab        | Card no                  | Gifts tab                      |          |
| Authorization Code      | Gifts tab, Misc tab        | Authorization code       | Gifts tab                      |          |
| Currency Type           | Gifts tab, Gift Menu       | Currency type            | Gifts tab, Gift Menu           |          |
| Currency Gift Amount    | Gifts tab, Gift Menu       | Gift amount – Grid       | Gifts tab, Gift Menu           |          |
| N\A                     | N\A                        | Converted gift amount    | Gifts tab, Gift Menu           |          |
| Exchange Rate           | Gifts tab, Gift Menu       | Exchange rate            | Gifts tab, Gift Menu           |          |
| Currency Receipt Amount | Gifts tab, Gift Menu       | Receipt amount – Grid    | Gifts tab, Gift Menu           |          |
| N\A                     | N\A                        | Converted receipt amount | Gifts tab, Gift Menu           |          |
| Expires On              | Gifts tab, Misc tab        | Expiration               | Gifts tab                      |          |
| Added By                | Gifts tab, Gift Statistics | Added by                 | File Menu, Options, Properties |          |
| Date Added              | Gifts tab                  | Date added               | File Menu, Options, Properties |          |
| Last Changed By         | Gifts tab, Gift Statistics | Last changed by          | File Menu, Options, Properties |          |
| Date Last Changed       | Gifts tab, Gift Statistics | Last changed on          | File Menu, Options, Properties |          |
| Import ID               | Gifts tab, Gift Statistics | Import ID                | File Menu, Options, Properties |          |
| Batch #                 | Gift tab                   | Batch No.                | File Menu, Options, Properties |          |

## Split Gifts

An example, a \$500 cash gift came in and was to the Capital Campaign, with the Appeal being the Annual Appeal, split between funds with \$300 to Fund A and \$200 to Fund B. In *The Raiser's Edge 7* the split tab would look like this:

| Campaign | Fund   | Appeal | Amount   |
|----------|--------|--------|----------|
| Capital  | Fund A | Annual | \$300.00 |
| Capital  | Fund B | Annual | \$200.00 |

The Campaign and Appeal are listed with each different fund even if the campaign and appeal are duplicated.

## GL Distribution

| RE 6.42 Field  | RE 6.42 Location                      | RE 7 Field         | RE 7 Location                  | Comments |
|----------------|---------------------------------------|--------------------|--------------------------------|----------|
| Debit Account  | Campaigns, Fund and Appeals, Fund tab | Debit Account No.  | Gifts tab, GL Distribution tab |          |
| Credit Account | Campaigns, Fund and Appeals, Fund tab | Credit Account No. | Gifts tab, GL Distribution tab |          |
| Amount         | Gifts tab                             | Amount             | Gifts tab, GL Distribution tab |          |
| Sub fund       | Campaigns, Fund and Appeals, Fund tab | Project            | Gifts tab, GL Distribution tab |          |
| N\A            | N\A                                   | Transfer           | Gifts tab, GL Distribution tab |          |

## Reversals And Adjustments

Credits in 6.4x convert as cash gifts with an adjustment equal to the credited amount

| RE 6.42 Field                  | RE 6.42 Location     | RE 7 Field                             | RE 7 Location              | Comments |
|--------------------------------|----------------------|----------------------------------------|----------------------------|----------|
| Reversal Date                  | Gifts tab, Gift Menu | Adjustment date                        | Gifts tab, Adjustments tab |          |
| Amount                         | Gifts tab, Gift Menu | Adjusted amount                        | Gifts tab, Adjustments tab |          |
| Fund                           | Gifts tab, Gift Menu | Adjusted fund                          | Gifts tab, Adjustments tab |          |
| Reversal Post Status           | Gifts tab, Gift Menu | Adj. GL post status                    | Gifts tab, Adjustments tab |          |
| Reversal Post Date             | Gifts tab, Gift Menu | Adj. GL post date                      | Gifts tab, Adjustments tab |          |
| N\A                            | N\A                  | Reason                                 | Gifts tab, Adjustments tab |          |
| Reversal Comments              | Gifts tab, Gift Menu | Notes                                  | Gifts tab, Adjustments tab |          |
| Reversal Soft credit recipient | Gifts tab, Gift Menu | Adjustment Soft credit Constituent     | Gifts tab, Adjustments tab |          |
| N\A                            | N\A                  | Adjustment Adjusted Soft Credit Amount | Gifts tab, Adjustments tab |          |

| RE 6.42 Field  | RE 6.42 Location                      | RE 7 Field                  | RE 7 Location                                           | Comments |
|----------------|---------------------------------------|-----------------------------|---------------------------------------------------------|----------|
| Debit account  | Campaigns, Fund and Appeals, Fund tab | Adjustment Debit Account #  | Gifts tab, Adjustments tab                              |          |
| Credit account | Campaigns, Fund and Appeals, Fund tab | Adjustment Credit Account # | Gifts tab, Adjustments tab                              |          |
| Amount         | Gifts tab                             | Adjustment Amount           | Gifts tab, Adjustments tab                              |          |
| Sub fund       | Campaigns, Fund and Appeals, Fund tab | Adjustment Project          | Gifts tab, Adjustments tab                              |          |
| N\A            | N\A                                   | Adjustment Transfer         | Gifts tab, Adjustments tab                              |          |
| N\A            | N\A                                   | Inst. #                     | Gifts tab, Adjustments tab, GL Installment Schedule tab |          |
| N\A            | N\A                                   | Date                        | Gifts tab, Adjustments tab, GL Installment Schedule tab |          |
| N\A            | N\A                                   | Adjusted Amount             | Gifts tab, Adjustments tab, GL Installment Schedule tab |          |
| N\A            | N\A                                   | Previous Amount             | Gifts tab, Adjustments tab, GL Installment Schedule tab |          |
| N\A            | N\A                                   | Balance                     | Gifts tab, Adjustments tab, GL Installment Schedule tab |          |
| N\A            | N\A                                   | Campaign                    | Gifts tab, Adjustments tab, Split Gift tab              |          |
| N\A            | N\A                                   | Fund                        | Gifts tab, Adjustments tab, Split Gift tab              |          |

---

| RE 6.42 Field | RE 6.42 Location | RE 7 Field      | RE 7 Location                                    | Comments |
|---------------|------------------|-----------------|--------------------------------------------------|----------|
| N\A           | N\A              | Appeal          | Gifts tab,<br>Adjustments tab,<br>Split Gift tab |          |
| N\A           | N\A              | Adjusted Amount | Gifts tab,<br>Adjustments tab,<br>Split Gift tab |          |

**Write – Offs**

| RE 6.42 Field               | RE 6.42 Location                      | RE 7 Field       | RE 7 Location        | Comments |
|-----------------------------|---------------------------------------|------------------|----------------------|----------|
| Write-off Date              | Gifts tab, Gift Menu                  | Date             | Gifts tab, Gift Menu |          |
| Write-off Amount            | Gifts tab, Gift Menu                  | Amount           | Gifts tab, Gift Menu |          |
| Write-off Reference         | Gifts tab, Gift Menu                  | Reference        | Gifts tab, Gift Menu |          |
| Write-off Post Status       | Gifts tab, Gift Menu                  | GL post status   | Gifts tab, Gift Menu |          |
| Write-off Post Date         | Gifts tab, Gift Menu                  | GL post date     | Gifts tab, Gift Menu |          |
| Installments Grid Date      | Gifts tab, Gift Menu                  | Date             | Gifts tab, Gift Menu |          |
| Installments Grid Fund      | Gifts tab, Gift Menu                  | Fund             | Gifts tab, Gift Menu |          |
| Installments Grid Amount    | Gifts tab, Gift Menu                  | Amount           | Gifts tab, Gift Menu |          |
| Installments Grid Reference | Gifts tab, Gift Menu                  | Reference        | Gifts tab, Gift Menu |          |
| Installments Grid Balance   | Gifts tab, Gift Menu                  | Balance          | Gifts tab, Gift Menu |          |
| Installments Grid Write-off | Gifts tab, Gift Menu                  | Write-off Amount | Gifts tab, Gift Menu |          |
| Debit                       | Campaigns, Fund and Appeals, Fund tab | Debit Account #  | Gifts tab, Gift Menu |          |
| Credit                      | Campaigns, Fund and Appeals, Fund tab | Credit Account # | Gifts tab, Gift Menu |          |
| Amount                      | Gifts tab, Gift Menu                  | Amount           | Gifts tab, Gift Menu |          |
| Sub fund                    | Campaigns, Fund and Appeals, Fund tab | Project          | Gifts tab, Gift Menu |          |
| N\A                         | N\A                                   | Transfer         | Gifts tab, Gift Menu |          |

## Stock and Sale of Stock

| RE 6.42 Field                       | RE 6.42 Location                      | RE 7 Field            | RE 7 Location                          | Comments |
|-------------------------------------|---------------------------------------|-----------------------|----------------------------------------|----------|
| Broker Fee                          | Gifts tab, Gift Menu                  | Broker fee            | Gifts tab, Gift Menu                   |          |
| N\A                                 | N\A                                   | Issuer                | Gifts tab, Gift Menu                   |          |
| N\A                                 | N\A                                   | Symbol                | Gifts tab. Gift tab.<br>Details button |          |
| N\A                                 | N\A                                   | # units               | Gifts tab. Gift tab.<br>Details button |          |
| N\A                                 | N\A                                   | Median price per unit | Gifts tab. Gift tab.<br>Details button |          |
| Comments                            | Gifts tab, Gift Menu                  | Notes                 | Gifts tab, Gift Menu                   |          |
| Date of Sale                        | Gifts tab, Gift Menu                  | Date of sale          | Gifts tab, Gift Menu                   |          |
| Sale Amount                         | Gifts tab, Gift Menu                  | Sale amount           | Gifts tab, Gift Menu                   |          |
| Post Date                           | Gifts tab, Gift Menu                  | GL post date          | Gifts tab, Gift Menu                   |          |
| Post Status                         | Gifts tab, Gift Menu                  | GL post status        | Gifts tab, Gift Menu                   |          |
| Gifts type as specified on the fund | Campaigns, Fund and Appeals, Fund tab | Gift Type             | Gifts tab, Gift Menu                   |          |
| N\A                                 | N\A                                   | Debit Account #       | Gifts tab, Gift Menu                   |          |
| N\A                                 | N\A                                   | Credit Account #      | Gifts tab, Gift Menu                   |          |
| Sub fund                            | Campaigns, Fund and Appeals, Fund tab | Project               | Gifts tab, Gift Menu                   |          |
| N\A                                 | N\A                                   | Transfer              | Gifts tab, Gift Menu                   |          |

## Matching Gift Information

| RE 6.42 Field                            | RE 6.42 Location     | RE 7 Field            | RE 7 Location                 | Comments |
|------------------------------------------|----------------------|-----------------------|-------------------------------|----------|
| Matching Gift Company – Constituent Name | Gifts tab, Match tab | Matching Gift Company | Gifts tab, Matching Gifts tab |          |
| N\A                                      | N\A                  | Gift type             | Gifts tab, Matching Gifts tab |          |
| Date                                     | Gifts tab, Match tab | Date                  | Gifts tab, Matching Gifts tab |          |



| RE 6.42 Field | RE 6.42 Location     | RE 7 Field       | RE 7 Location                                | Comments |
|---------------|----------------------|------------------|----------------------------------------------|----------|
| Amount        | Gifts tab, Match tab | Amount           | Gifts tab, Matching Gifts tab                |          |
| Campaign      | Gifts tab, Match tab | Campaign         | Gifts tab, Matching Gifts tab                |          |
| Fund          | Gifts tab, Match tab | Fund             | Gifts tab, Matching Gifts tab                |          |
| N\A           | N\A                  | Appeal           | Gifts tab, Matching Gifts tab                |          |
| N\A           | N\A                  | Solicitor(s)     | Gifts tab, Matching Gifts tab                |          |
| Reference     | Gifts tab, Match tab | Reference        | Gifts tab, Matching Gifts tab                |          |
| N\A           | N\A                  | Acknowledge      | Gifts tab, Matching Gifts tab                |          |
| N\A           | N\A                  | Acknowledge date | Gifts tab, Matching Gifts tab                |          |
| Letter        | Gifts tab, Match tab | Letter           | Gifts tab, Matching Gifts tab                |          |
| N\A           | N\A                  | Letter button    | Gifts tab, Matching Gifts tab, Letter button |          |
| N\A           | N\A                  | Receipt          | Gifts tab, Matching Gifts tab                |          |
| N\A           | N\A                  | Receipt date     | Gifts tab, Matching Gifts tab                |          |
| N\A           | N\A                  | Receipt amt      | Gifts tab, Matching Gifts tab                |          |
| N\A           | N\A                  | Benefits         | Gifts tab, Matching Gifts tab                |          |
| N\A           | N\A                  | Receipt no.      | Gifts tab, Matching Gifts tab                |          |
| N\A           | N\A                  | Gift ID          | Gifts tab, Matching Gifts tab, Misc tab      |          |
| N\A           | N\A                  | Constituency     | Gifts tab, Matching Gifts tab, Misc tab      |          |

| RE 6.42 Field | RE 6.42 Location     | RE 7 Field              | RE 7 Location                                  | Comments                                                                                                                                     |
|---------------|----------------------|-------------------------|------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------|
| Gift code     | Gifts tab, Match tab | Gift code               | Gifts tab, Matching Gifts tab, Misc tab        |                                                                                                                                              |
| N\A           | N\A                  | GL post status          | Gifts tab, Matching Gifts tab, Misc tab        |                                                                                                                                              |
| N\A           | N\A                  | GL post date            | Gifts tab, Matching Gifts tab, Misc tab        |                                                                                                                                              |
| N\A           | N\A                  | Gift is anonymous       | Gifts tab, Matching Gifts tab, Misc tab        |                                                                                                                                              |
| N\A           | N\A                  | Notes                   | Gifts tab, Matching Gifts tab, Misc tab        |                                                                                                                                              |
| N\A           | N\A                  | Notes Type              | Gifts tab, Matching Gifts tab, Misc tab        | RE7-Conversion                                                                                                                               |
| N\A           | N\A                  | Notes Date              | Gifts tab, Matching Gifts tab, Misc tab        | Date of note in 6.4x                                                                                                                         |
| N\A           | N\A                  | Notes Author            | Gifts tab, Matching Gifts tab, Misc tab        | User who added the gift.                                                                                                                     |
| N\A           | N\A                  | Notes Title             | Gifts tab, Matching Gifts tab, Misc tab        |                                                                                                                                              |
| N\A           | N\A                  | Notes Description       | Gifts tab, Matching Gifts tab, Misc tab        | Matching Gifts tab, Misc tab If gift is linked to an EFT record in 6.x, this appears as RE7 Conversion- EFT Notes. Otherwise, this is blank. |
| N\A           | N\A                  | Soft credit constituent | Gifts tab, Matching Gifts tab, Soft Credit tab |                                                                                                                                              |
| N\A           | N\A                  | Amount                  | Gifts tab, Matching Gifts tab, Soft Credit tab |                                                                                                                                              |

| RE 6.42 Field | RE 6.42 Location | RE 7 Field       | RE 7 Location                                               | Comments |
|---------------|------------------|------------------|-------------------------------------------------------------|----------|
| N\A           | N\A              | Debit Account #  | Gifts tab,<br>Matching Gifts<br>tab, GL<br>Distribution tab |          |
| N\A           | N\A              | Credit Account # | Gifts tab,<br>Matching Gifts<br>tab, GL<br>Distribution tab |          |
| N\A           | N\A              | Amount           | Gifts tab,<br>Matching Gifts<br>tab, GL<br>Distribution tab |          |
| N\A           | N\A              | Project          | Gifts tab,<br>Matching Gifts<br>tab, GL<br>Distribution tab |          |
| N\A           | N\A              | Transfer         | Gifts tab,<br>Matching Gifts<br>tab, GL<br>Distribution tab |          |
| N\A           | N\A              | Split Gifts tab  | Gifts tab,<br>Matching Gifts<br>tab, Split Gifts tab        |          |

**Honor/Memorial Information**

| RE 6.42 Field                   | RE 6.42 Location             | RE 7 Field     | RE 7 Location                       | Comments                                                                                                       |
|---------------------------------|------------------------------|----------------|-------------------------------------|----------------------------------------------------------------------------------------------------------------|
| Hon/Mem Name                    | Gifts tab,<br>Hon/Mem tab    | Honor/Memorial | Gifts tab,<br>Honor/Memorial<br>tab |                                                                                                                |
| Hon/Mem Type                    | Honor/Memorial<br>tab        | Tribute type   | Gift tab,<br>Honor/Memorial<br>tab  | If Hon/Mem Type is<br>blank in version 6.4x,<br>this field converts as a<br>tribute type of<br>RE7 Conversion. |
| Acknowledge                     | Gifts tab,<br>Hon/Mem tab    | Letter Sent    | Gifts tab,<br>Honor/Memorial<br>tab |                                                                                                                |
| Acknowledge<br>(column in grid) | Gifts tab,<br>Hon/Mem tab    | Ack            | Gifts tab,<br>Honor/Memorial<br>tab |                                                                                                                |
| Hon/Mem Ack<br>Name             | Gifts tab,<br>Hon/Mem tab    | Constituent    | Gifts tab,<br>Honor/Memorial<br>tab |                                                                                                                |
| Hon/Mem Ack<br>Relationship     | Gifts tab,<br>Hon/Mem tab    | Relationship   | Gifts tab,<br>Honor/Memorial<br>tab |                                                                                                                |
| Hon/Mem Ack<br>Letter           | Gifts tab,<br>Hon/Mem tab    | Letter         | Gifts tab,<br>Honor/Memorial<br>tab |                                                                                                                |
| N\A                             | N\A                          | Letter Sent    | Gifts tab,<br>Honor/Memorial<br>tab |                                                                                                                |
| Soft Credit<br>Constituent Name | Gift tab, Soft<br>Credit tab | Constituent    | Gift tab, Soft Credit<br>tab        |                                                                                                                |
| N\A                             | N\A                          | Amount         | Gift tab, Soft Credit<br>tab        |                                                                                                                |

## Recurring Gift information

| RE 6.42 Field                      | RE 6.42 Location      | RE 7 Field           | RE 7 Location                                               | Comments                                                                                        |
|------------------------------------|-----------------------|----------------------|-------------------------------------------------------------|-------------------------------------------------------------------------------------------------|
| Electronic Transaction             | EFT                   | Recurring gift       |                                                             |                                                                                                 |
| EFT – Days/Weeks                   | EFT                   | Days/Weeks           | Gifts tab,<br>Pre-Notify button                             | This field is based on the payment method and is available only on direct debit or bank drafts. |
| EFT – Date of Last Prenotification | Pre-Notification Date |                      |                                                             | No equivalent in version 7.                                                                     |
| EFT Status                         | Status                | Status               | Gifts tab                                                   | EFTs in 6.4x with a status of completed convert with a status of Closed in 7.                   |
| Frequency                          | Frequency             | Frequency            | Gifts tab,<br>Transactions tab,<br>Frequency button         |                                                                                                 |
| Effective                          | Effective Start Date  | Starting on          | Gifts tab,<br>Transactions tab,<br>Frequency button         |                                                                                                 |
| Until                              | Effective Until Date  | Ending on            | Gifts tab,<br>Transactions tab,<br>Frequency button         |                                                                                                 |
| N/A                                | N/A                   | No. years            | Gifts tab,<br>Transactions tab,<br>Frequency button         | No equivalent in 6.4x, so this will convert blank.                                              |
|                                    |                       | On                   | Gifts tab,<br>Transactions tab,<br>Frequency button         | No equivalent in 6.4x, so this will convert blank.                                              |
|                                    |                       | Day                  | Gifts tab,<br>Transactions tab,<br>Frequency button         | No equivalent in 6.4x, so this will convert blank.                                              |
| Next Transaction Due               | Next transaction date | Next transaction due | Gifts tab,<br>Transactions tab,<br>Status bar at the bottom |                                                                                                 |

---

| RE 6.42 Field       | RE 6.42 Location | RE 7 Field              | RE 7 Location                                               | Comments                                               |
|---------------------|------------------|-------------------------|-------------------------------------------------------------|--------------------------------------------------------|
| Next Payment Amount | Amount           | Next transaction amount | Gifts tab,<br>Transactions tab,<br>Status bar at the bottom |                                                        |
| Total to Date       |                  | Received                | Gifts tab,<br>Transactions tab,<br>Status bar at the bottom | This is a calculated field in both 6.4x and version 7. |

## Gift Attributes

| RE 6.42 Field | RE 6.42 Location             | RE 7 Field  | RE 7 Location                | Comments |
|---------------|------------------------------|-------------|------------------------------|----------|
| Category      | Gifts tab,<br>Attributes tab | Category    | Gifts tab,<br>Attributes tab |          |
| Description   | Gifts tab,<br>Attributes tab | Description | Gifts tab,<br>Attributes tab |          |
| N\A           | N\A                          | Short Desc. | Gifts tab,<br>Attributes tab |          |
| N\A           | N\A                          | Date        | Gifts tab,<br>Attributes tab |          |
| Comments      | Gifts tab,<br>Attributes tab | Comments    | Gifts tab,<br>Attributes tab |          |

## Actions Information

| RE 6.42 Field | RE 6.42 Location | RE 7 Field               | RE 7 Location | Comments                                                                                |
|---------------|------------------|--------------------------|---------------|-----------------------------------------------------------------------------------------|
| N\A           | N\A              | Category                 | Action tab    | All actions convert as Task/Other to preserve information.                              |
| Action Date   | Action tab       | Action date              | Action tab    |                                                                                         |
| Time          | Action tab       | Start time               | Action tab    |                                                                                         |
| N\A           | N\A              | End time                 | Action tab    |                                                                                         |
| Action Type   | Action tab       | Action type              | Action tab    |                                                                                         |
| Status        | Action tab       | Status                   | Action tab    |                                                                                         |
| Assigned To   | Action tab       | Assigned to              | Action tab    |                                                                                         |
| N\A           | N\A              | Action completed         | Action tab    | For more information, see the “The Raiser’s Edge 6 Post Conversion Utility” on page 19. |
| N\A           | N\A              | Action completed on date | Action tab    | For more information, see the “The Raiser’s Edge 6 Post Conversion Utility” on page 19. |
| N\A           | N\A              | Phone #                  | Action tab    |                                                                                         |
| N\A           | N\A              | Location                 | Action tab    |                                                                                         |

| RE 6.42 Field | RE 6.42 Location | RE 7 Field                   | RE 7 Location | Comments                                          |
|---------------|------------------|------------------------------|---------------|---------------------------------------------------|
| Letter        | Action tab       | Letter                       | Action tab    | Available only if the action category is Mailing. |
| N\A           | N\A              | Email address                | Action tab    |                                                   |
| N\A           | N\A              | Campaign                     | Action tab    |                                                   |
| N\A           | N\A              | Fund                         | Action tab    |                                                   |
| Priority      | Action tab       | Priority                     | Action tab    |                                                   |
| Proposal      | Action tab       | Proposal                     | Action tab    |                                                   |
| User Name     | Action tab       | Notify                       | Action tab    |                                                   |
| Remind        | Action tab       | Auto-Remind                  | Action tab    |                                                   |
| Notes         | Action tab       | Notes                        | Action tab    |                                                   |
| N\A           | N\A              | Action is part of this track | Action tab    |                                                   |

### Action Attributes Information

| RE 6.42 Field | RE 6.42 Location | RE 7 Field  | RE 7 Location | Comments |
|---------------|------------------|-------------|---------------|----------|
| Category      | Action tab       | Category    | Action tab    |          |
| Description   | Action tab       | Description | Action tab    |          |
| Comment       | Action tab       | Comments    | Action tab    |          |
| N\A           | N\A              | Short Desc  | Action tab    |          |
| N\A           | N\A              | Date        | Action tab    |          |

### Media Information

| RE 6.42 Field | RE 6.42 Location | RE 7 Field  | RE 7 Location | Comments                             |
|---------------|------------------|-------------|---------------|--------------------------------------|
| Description   | Media tab        | Description | Media tab     |                                      |
| Object Type   | Media tab        | Type        | Media tab     |                                      |
| N\A           | N\A              | Date        | Media tab     |                                      |
| N\A           | N\A              | Title       | Media tab     |                                      |
| N\A           | N\A              | Author      | Media tab     | Author appears as "RE 7 Conversion". |



## Constituent Attribute Information

For more information, see the “The Raiser’s Edge 6 Post Conversion Utility” on page 19.

| RE 6.42 Field | RE 6.42 Location | RE 7 Field  | RE 7 Location | Comments |
|---------------|------------------|-------------|---------------|----------|
| Category      | Attributes tab   | Category    | Attribute tab |          |
| Description   | Attribute tab    | Description | Attribute tab |          |
| N\A           | N\A              | Short Desc. | Attribute tab |          |
| N\A           | N\A              | Date        | Attribute tab |          |
| Comment       | Attribute tab    | Comments    | Attribute tab |          |

## Constituent Solicitor Information

### Assigned Solicitors Grid

| RE 6.42 Field | RE 6.42 Location | RE 7 Field                        | RE 7 Location                         | Comments |
|---------------|------------------|-----------------------------------|---------------------------------------|----------|
| Name          | Solicitor tab    | Solicitor                         | Relationships tab, Assigned Solicitor |          |
| N\A           | N\A              | Solicitor Type                    | Relationships tab, Assigned Solicitor |          |
| Campaign      | Solicitor tab    | Campaign                          | Relationships tab, Assigned Solicitor |          |
| Fund          | Solicitor tab    | Fund                              | Relationships tab, Assigned Solicitor |          |
| Date From     | Solicitor tab    | Date From                         | Relationships tab, Assigned Solicitor |          |
| Date To       | Solicitor tab    | Date To                           | Relationships tab, Assigned Solicitor |          |
| N\A           | N\A              | Amount                            | Relationships tab, Assigned Solicitor |          |
| N\A           | N\A              | Track changes to this constituent | Relationships tab, Assigned Solicitor |          |
| N\A           | N\A              | Notes                             | Relationships tab, Assigned Solicitor |          |

### Constituent Solicitor Information continued...

| RE 6.42 Field              | RE 6.42 Location | RE 7 Field                 | RE 7 Location             | Comments |
|----------------------------|------------------|----------------------------|---------------------------|----------|
| Constituent is a solicitor | Solicitor tab    | Constituent is a solicitor | Bio 1 tab                 |          |
| N\A                        | N\A              | This solicitor is inactive | Bio 1 tab, Details button |          |
| Campaign                   | Solicitor tab    | Campaign                   | Bio 1 tab, Details button |          |
| Goal                       | Solicitor tab    | Goal Amount                | Bio 1 tab, Details button |          |
| Reports To                 | Solicitor tab    | Reports to                 | Bio 1 tab, Details button |          |

---

| RE 6.42 Field | RE 6.42 Location | RE 7 Field                | RE 7 Location             | Comments |
|---------------|------------------|---------------------------|---------------------------|----------|
| N\A           | N\A              | Notes                     | Bio 1 tab, Details button |          |
| N\A           | N\A              | Unspecified – Category    | Bio 1 tab, Details button |          |
| N\A           | N\A              | Unspecified – Goal amount | Bio 1 tab, Details button |          |
| N\A           | N\A              | Notes                     | Bio 1 tab, Details button |          |

## Tribute

| RE 6.42 Field                                          | RE 6.42 Location                       | RE 7 Field                         | RE 7 Location                     | Comments                                                                                           |
|--------------------------------------------------------|----------------------------------------|------------------------------------|-----------------------------------|----------------------------------------------------------------------------------------------------|
| Constituent is an Honor/Memorial                       | Bio 1 tab                              | Constituent is an Honor/memorial   | Honor/Memorial tab                |                                                                                                    |
| Hon/Mem Type                                           | Honor/Memorial tab                     | Tribute type                       | Honor/Memorial tab                | If Hon/Mem Type is blank in version 6.4x, this field converts as a tribute type of RE7 Conversion. |
| Description                                            | Honor/Memorial tab                     | Description                        | Honor/Memorial tab                |                                                                                                    |
| Hon/Mem Date                                           | Honor/Memorial tab                     | Date from                          | Honor/Memorial tab                |                                                                                                    |
| N\A                                                    | N\A                                    | Date to                            | Honor/Memorial tab                |                                                                                                    |
| Acknowledge Hon/Mem Gifts or Name from the Gift record | Honor/Memorial tab, Acknowledge button | Name                               | Honor/Memorial tab, Acknowledgees |                                                                                                    |
| Relationship                                           | Honor/Memorial tab, Acknowledge button | Association                        | Honor/Memorial tab, Acknowledgees |                                                                                                    |
| N\A                                                    | N\A                                    | Reciprocal                         | Honor/Memorial tab, Acknowledgees |                                                                                                    |
| N\A                                                    | N\A                                    | Letter                             | Honor/Memorial tab, Acknowledgees |                                                                                                    |
| Hon/Mem Notes                                          | Honor/Memorial tab                     | Notes                              | Honor/Memorial tab                |                                                                                                    |
| Active                                                 | Honor/Memorial tab                     | Gifts may be given to this tribute | Honor/Memorial tab                |                                                                                                    |

## Volunteer

| RE 6.42 Field                | RE 6.42 Location                   | RE 7 Field                         | RE 7 Location                         | Comments                                                                           |
|------------------------------|------------------------------------|------------------------------------|---------------------------------------|------------------------------------------------------------------------------------|
| Type                         | Volunteer tab                      | Type                               | Volunteer tab, General                | See “The Raiser’s Edge 6 Post Conversion Utility” on page 19 for more information. |
| Status                       | Volunteer tab                      | Status                             | Volunteer tab, General                |                                                                                    |
| Statistics – Date Started    | Volunteer tab                      | Begin Date                         | Volunteer tab, General                |                                                                                    |
| Statistics – Date Finished   | Volunteer tab                      | End Date                           | Volunteer tab, General                |                                                                                    |
| Statistics – Reason Finished | Volunteer tab                      | Reason Finished                    | Volunteer tab, General                |                                                                                    |
| Emergency Contact – Name     | Volunteer tab                      | Name                               | Volunteer tab, General                |                                                                                    |
| Emergency Contact – Relation | Volunteer tab                      | Relation                           | Volunteer tab, General                |                                                                                    |
| Emergency Contact – Phone    | Volunteer tab                      | Phone                              | Volunteer tab, General                |                                                                                    |
| N\A                          | N\A                                | Personal vehicle available for use | Volunteer tab, General                |                                                                                    |
| N\A                          | N\A                                | Vehicle type                       | Volunteer tab, General                |                                                                                    |
|                              |                                    | Comments                           | Volunteer tab, General                |                                                                                    |
| Assignment Interests         | Volunteer tab                      | Assignment Interests               | Volunteer tab, Availability/Interests |                                                                                    |
| Notes                        | Volunteer tab                      | Notes                              | Notes tab of the Constituent Record   |                                                                                    |
| Availability – From Date     | Volunteer tab, Availability button | From Date                          | Volunteer tab, Availability/Interests |                                                                                    |
| Availability – To Date       | Volunteer tab, Availability button | To Date                            | Volunteer tab, Availability/Interests |                                                                                    |

| RE 6.42 Field                                     | RE 6.42 Location                     | RE 7 Field  | RE 7 Location                         | Comments |
|---------------------------------------------------|--------------------------------------|-------------|---------------------------------------|----------|
| Availability – Day                                | Volunteer tab, Availability button   | Days        | Volunteer tab, Availability/Interests |          |
| Availability – Start Time                         | Volunteer tab, Availability button   | Start Time  | Volunteer tab, Availability/Interests |          |
| Availability – End Time                           | Volunteer tab, Availability button   | End Time    | Volunteer tab, Availability/Interests |          |
| Qualifications – Skills/Experience–Description    | Volunteer tab, Qualifications button | Description | Volunteer tab, Qualifications         |          |
| Qualifications – Skills/Experience – Skill Level  | Volunteer tab, Qualifications button | Skill Level | Volunteer tab, Qualifications         |          |
| Qualifications – Skills/Experience – License Type | Volunteer tab, Qualifications button | License     | Volunteer tab, Qualifications         |          |
| Qualifications – Skills/Experience – License #    | Volunteer tab, Qualifications button | License No. | Volunteer tab, Qualifications         |          |
| Qualifications – Skills/Experience – Expires      | Volunteer tab, Qualifications button | Expires     | Volunteer tab, Qualifications         |          |
| Qualifications – Skills/Experience – Comments     | Volunteer tab, Qualifications button | Comments    | Volunteer tab, Qualifications         |          |
| Qualifications – Courses/Training – Course Name   | Volunteer tab, Qualifications button | Course      | Volunteer tab, Qualifications         |          |
| Qualifications – Courses/Training – Start Date    | Volunteer tab, Qualifications button | Start Date  | Volunteer tab, Qualifications         |          |
| Qualifications – Courses/Training – End Date      | Volunteer tab, Qualifications button | End Date    | Volunteer tab, Qualifications         |          |
| Qualifications – Courses/Training – Instructor    | Volunteer tab, Qualifications button | Instructor  | Volunteer tab, Qualifications         |          |

| RE 6.42 Field                                     | RE 6.42 Location                     | RE 7 Field     | RE 7 Location                 | Comments                                                                     |
|---------------------------------------------------|--------------------------------------|----------------|-------------------------------|------------------------------------------------------------------------------|
| Qualifications – Courses/Training – Certification | Volunteer tab, Qualifications button | Certification  | Volunteer tab, Qualifications |                                                                              |
| Qualifications – Courses/Training – Expires       | Volunteer tab, Qualifications button | Expires        | Volunteer tab, Qualifications |                                                                              |
| Qualifications – Courses/Training – Comments      | Volunteer tab, Qualifications button | Comments       | Volunteer tab, Qualifications |                                                                              |
| Assignments – Assignment                          | Volunteer tab, Assignments button    | Job Assignment | Volunteer tab, Assignments    | Volunteer assignments in 6.4x are converted to job assignments in version 7. |
| N\A                                               | N\A                                  | Status         | Volunteer tab, Assignments    | All job assignment records convert with a status of assigned.                |
| Assignment – Department                           | Volunteer tab, Assignments button    | Department     | Volunteer tab, Assignments    |                                                                              |
| Assignment – Position                             | Volunteer tab, Assignments button    | Position       | Volunteer tab, Assignments    |                                                                              |
| Assignment – Location                             | Volunteer tab, Assignments button    | Location       | Volunteer tab, Assignments    |                                                                              |
| Assignment – From Date                            | Volunteer tab, Assignments button    | Start date     | Volunteer tab, Assignments    |                                                                              |
| Assignment – To Date                              | Volunteer tab, Assignments button    | End date       | Volunteer tab, Assignments    |                                                                              |
| Assignment – Start Time                           | Volunteer tab, Assignments button    | Start time     | Volunteer tab, Assignments    |                                                                              |
| Assignment – End Time                             | Volunteer tab, Assignments button    | End time       | Volunteer tab, Assignments    |                                                                              |
| Assignment – Day of Week                          | Volunteer tab, Assignments button    | N\A            | N\A                           | This field has no equivalent in version 7.                                   |

| RE 6.42 Field           | RE 6.42 Location                  | RE 7 Field                                                            | RE 7 Location              | Comments                                                                                    |
|-------------------------|-----------------------------------|-----------------------------------------------------------------------|----------------------------|---------------------------------------------------------------------------------------------|
| N\A                     | N\A                               | Letter sent on                                                        | Volunteer tab, Assignments | The Letter sent on checkbox converts as unmarked and the corresponding date field is blank. |
| N\A                     | N\A                               | Task                                                                  | Volunteer tab, Assignments |                                                                                             |
| N\A                     | N\A                               | Volunteer type                                                        | Volunteer tab, Assignments |                                                                                             |
| N\A                     | N\A                               | Supervisor                                                            | Volunteer tab, Assignments |                                                                                             |
| N\A                     | N\A                               | Assignment schedule grid, Date                                        | Volunteer tab, Assignments |                                                                                             |
| N\A                     | N\A                               | Attended                                                              | Volunteer tab, Assignments |                                                                                             |
| N\A                     | N\A                               | Rating                                                                | Volunteer tab, Assignments |                                                                                             |
| N\A                     | N\A                               | Assign schedule button and field associated with the following dialog | Volunteer tab, Assignments |                                                                                             |
| Time Sheet – Date       | Volunteer tab, Time Sheets button | Date                                                                  | Volunteer tab, Time Sheets |                                                                                             |
| Time Sheet – Assignment | Volunteer tab, Time Sheets button | Assignment                                                            | Volunteer tab, Time Sheets |                                                                                             |
| Time Sheet – Department | Volunteer tab, Time Sheets button | Department                                                            | Volunteer tab, Time Sheets |                                                                                             |
| Time Sheet – Location   | Volunteer tab, Time Sheets button | Location                                                              | Volunteer tab, Time Sheets |                                                                                             |
| Time Sheet – Position   | Volunteer tab, Time Sheets button | Position                                                              | Volunteer tab, Time Sheets |                                                                                             |
| N\A                     | N\A                               | Task                                                                  | Volunteer tab, Time Sheets |                                                                                             |
| N\A                     | N\A                               | Volunteer type                                                        | Volunteer tab, Time Sheets |                                                                                             |
| Time Sheet – Hours      | Volunteer tab, Time Sheets button | Hours                                                                 | Volunteer tab, Time Sheets |                                                                                             |



| RE 6.42 Field             | RE 6.42 Location                  | RE 7 Field                              | RE 7 Location               | Comments |
|---------------------------|-----------------------------------|-----------------------------------------|-----------------------------|----------|
| Time Sheet – Hourly Wages | Volunteer tab, Time Sheets button | Hourly wage                             | Volunteer tab, Time Sheets  |          |
| Time Sheet – Value        | Volunteer tab, Time Sheets button | Value                                   | Volunteer tab, Time Sheets  |          |
| N\A                       | N\A                               | Notes                                   | Volunteer tab, Time Sheets  |          |
| Awards – Next Award       | Volunteer tab, Awards button      | Future Award Section - Award            | Volunteer tab, Awards       |          |
| Awards – Award Hours      | Volunteer tab, Awards button      | Future Award Section -Award Hours/Years | Volunteer tab, Awards       |          |
| N\A                       | N\A                               | Future Award Section - Comments         | Volunteer tab, Awards       |          |
| Awards – Date             | Volunteer tab, Awards button      | Date                                    | Volunteer tab, Awards       |          |
| Awards – Description      | Volunteer tab, Awards button      | Description                             | Volunteer tab, Awards       |          |
| Awards – Presented With   | Volunteer tab, Awards button      | Presented With                          | Volunteer tab, Awards       |          |
| Awards – Presented By     | Volunteer tab, Awards button      | Presented By                            | Volunteer tab, Awards       |          |
| Awards – Comments         | Awards, Comments                  | Comments                                | Volunteer tab, Awards       |          |
| N\A                       | N\A                               | Start date                              | Volunteer tab, Mandate Info |          |
| N\A                       | N\A                               | Date completed                          | Volunteer tab, Mandate Info |          |
| N\A                       | N\A                               | Mandate hours                           | Volunteer tab, Mandate Info |          |
| N\A                       | N\A                               | Hours served                            | Volunteer tab, Mandate Info |          |
| N\A                       | N\A                               | Agency name                             | Volunteer tab, Mandate Info |          |
| N\A                       | N\A                               | Contact name                            | Volunteer tab, Mandate Info |          |

| RE 6.42 Field                                    | RE 6.42 Location                 | RE 7 Field                      | RE 7 Location                  | Comments |
|--------------------------------------------------|----------------------------------|---------------------------------|--------------------------------|----------|
| N\A                                              | N\A                              | Address                         | Volunteer tab,<br>Mandate Info |          |
| N\A                                              | N\A                              | Contact phone                   | Volunteer tab,<br>Mandate Info |          |
| N\A                                              | N\A                              | Comments                        | Volunteer tab,<br>Mandate Info |          |
| N\A                                              | N\A                              | Checklist Item                  | Volunteer tab,<br>Checklist    |          |
| N\A                                              | N\A                              | Date Requested                  | Volunteer tab,<br>Checklist    |          |
| N\A                                              | N\A                              | Date Completed                  | Volunteer tab,<br>Checklist    |          |
| N\A                                              | N\A                              | Letter                          | Volunteer tab,<br>Checklist    |          |
| N\A                                              | N\A                              | Comments                        | Volunteer tab,<br>Checklist    |          |
| N\A                                              | N\A                              | First assignment                | Volunteer tab,<br>Summary      |          |
| N\A                                              | N\A                              | First assignment<br>start date  | Volunteer tab,<br>Summary      |          |
| N\A                                              | N\A                              | First assignment<br>end date    | Volunteer tab,<br>Summary      |          |
| Summary<br>Information – Last<br>Assignment Name | Volunteer tab,<br>Summary button | Last assignment                 | Volunteer tab,<br>Summary      |          |
| Summary<br>Information – Date                    | Volunteer tab,<br>Summary button | Last Assignment –<br>Start Date | Volunteer tab,<br>Summary      |          |
| N\A                                              | N\A                              | Last Assignment –<br>End Date   | Volunteer tab,<br>Summary      |          |
| Summary<br>Information – Total<br>Hours          | Volunteer tab,<br>Summary button | Total hours of<br>service       | Volunteer tab,<br>Summary      |          |
| Summary<br>Information – Total<br>Value          | Volunteer tab,<br>Summary button | N\A                             | N\A                            |          |
| N\A                                              | N\A                              | Total jobs attended             | Volunteer tab,<br>Summary      |          |

---

| RE 6.42 Field | RE 6.42 Location | RE 7 Field                   | RE 7 Location                   | Comments |
|---------------|------------------|------------------------------|---------------------------------|----------|
| N\A           | N\A              | Total years of service       | Volunteer tab, Summary          |          |
| N\A           | N\A              | Consecutive years of service | Volunteer tab, Summary          |          |
| N\A           | N\A              | Total awards                 | Volunteer tab, Summary          |          |
| N\A           | N\A              | Hours worked this year       | Volunteer tab, Summary          |          |
| N\A           | N\A              | Volunteer start date         | Volunteer tab, Summary Treeview |          |

## Volunteer Jobs

| RE 6.42 Field | RE 6.42 Location                 | RE 7 Field                                  | RE 7 Location           | Comments |
|---------------|----------------------------------|---------------------------------------------|-------------------------|----------|
| Assignment    | Volunteer tab, Assignment button | Assignment                                  | Job record, General tab |          |
| N\A           | N\A                              | Category                                    | Job record, General tab |          |
| N\A           | N\A                              | Start Date                                  | Job record, General tab |          |
| N\A           | N\A                              | End Date                                    | Job record, General tab |          |
| N\A           | N\A                              | Position                                    | Job record, General tab |          |
| N\A           | N\A                              | Volunteer Type                              | Job record, General tab |          |
| N\A           | N\A                              | Minimum Age                                 | Job record, General tab |          |
| N\A           | N\A                              | Allow Mandated Volunteers?                  | Job record, General tab |          |
| N\A           | N\A                              | Job Completed?                              | Job record, General tab |          |
| N\A           | N\A                              | Description                                 | Job record, General tab |          |
| N\A           | N\A                              | This job is for an Organization or an Event | Job record, General tab |          |
|               |                                  |                                             |                         |          |

## Prospect Research

| RE 6.42 Field           | RE 6.42 Location | RE 7 Field              | RE 7 Location | Comments |
|-------------------------|------------------|-------------------------|---------------|----------|
| Classification          | Prospect tab     | Classification          | Prospect tab  |          |
| N\A                     | N\A              | Prospect Status         | Prospect tab  |          |
| Philanthropic Interests | Prospect tab     | Philanthropic Interests | Prospect tab  |          |
| N\A                     | N\A              | Comments                | Prospect tab  |          |
| Will Not Give To        | Prospect tab     | Will Not Give To        | Prospect tab  |          |

| RE 6.42 Field                                    | RE 6.42 Location               | RE 7 Field                                       | RE 7 Location                       | Comments |
|--------------------------------------------------|--------------------------------|--------------------------------------------------|-------------------------------------|----------|
| N\A                                              | N\A                            | Comments                                         | Prospect tab                        |          |
| Gifts to Other Organizations – Organization Name | Prospect tab                   | Gifts to Other Organizations – Organization Name | Prospect tab                        |          |
| N\A                                              | N\A                            | Gifts to Other Organizations – Organization Type | Prospect tab                        |          |
| Gifts to Other Organizations – Amount            | Prospect tab                   | Gifts to Other Organizations – Amount            | Prospect tab                        |          |
| Gifts to Other Organizations – Date Given        | Prospect tab                   | Gifts to Other Organizations – Date Given        | Prospect tab                        |          |
| Gifts to Other Organizations – Reason            | Prospect tab                   | Gifts to Other Organizations – Reason            | Prospect tab                        |          |
| N\A                                              | N\A                            | Gifts to Other Organizations – Comments          | Prospect tab                        |          |
| Financial Data – Information Type                | Prospect tab, Financial button | Information Type                                 | Prospect tab, Financial Information |          |
| Financial Data – Amount                          | Prospect tab, Financial button | Amount                                           | Prospect tab, Financial Information |          |
| Financial Data – Info Source                     | Prospect tab, Financial button | Info Source                                      | Prospect tab, Financial Information |          |
| Financial Data – Comments                        | Prospect tab, Financial button | Notes                                            | Prospect tab, Financial Information |          |
| Financial Data – Date Acquired                   | Prospect tab, Financial button | Date acquired                                    | Prospect tab, Financial Information |          |
| Financial Data – Date Assessed                   | Prospect tab, Financial button | Date assessed                                    | Prospect tab, Financial Information |          |
| N\A                                              | N\A                            | Notes                                            | Prospect tab, Financial Information |          |

| RE 6.42 Field                      | RE 6.42 Location                 | RE 7 Field        | RE 7 Location             | Comments                                                                                                                              |
|------------------------------------|----------------------------------|-------------------|---------------------------|---------------------------------------------------------------------------------------------------------------------------------------|
| N\A                                | N\A                              | Name              | Prospect tab,<br>Proposal | No equivalent for this in 6.4x, but this field is required in 7. The name is constructed using "Proposal for {Constituent Key Name}". |
| Proposal – Purpose                 | Prospect tab,<br>Proposal button | Purpose           | Prospect tab,<br>Proposal |                                                                                                                                       |
| Proposal – Campaign                | Prospect tab,<br>Proposal button | Campaign          | Prospect tab,<br>Proposal |                                                                                                                                       |
| Proposal – Fund                    | Prospect tab,<br>Proposal button | Fund              | Prospect tab,<br>Proposal |                                                                                                                                       |
| Proposal – Canvasser or Solicitor  | Prospect tab,<br>Proposal button | Solicitors button | Prospect tab,<br>Proposal |                                                                                                                                       |
| Proposal – Deadline                | Prospect tab,<br>Proposal button | Deadline          | Prospect tab,<br>Proposal |                                                                                                                                       |
| Proposal – Status                  | Prospect tab,<br>Proposal button | Status            | Prospect tab,<br>Proposal |                                                                                                                                       |
| N\A                                | N\A                              | Reason            | Prospect tab,<br>Proposal |                                                                                                                                       |
| Proposal – Type of Gift            | Prospect tab,<br>Proposal button | Type of gift      | Prospect tab,<br>Proposal |                                                                                                                                       |
| Proposal – Instrument              | Prospect tab,<br>Proposal button | Instrument        | Prospect tab,<br>Proposal |                                                                                                                                       |
| Proposal – Rating                  | Prospect tab,<br>Proposal button | Rating            | Prospect tab,<br>Proposal |                                                                                                                                       |
| Proposal – Date Rated              | Prospect tab,<br>Proposal button | Date rated        | Prospect tab,<br>Proposal |                                                                                                                                       |
| Proposal Amounts – Amount Asked    | Prospect tab,<br>Proposal button | Amount asked      | Prospect tab,<br>Proposal |                                                                                                                                       |
| Proposal Amounts – Amount Expected | Prospect tab,<br>Proposal button | Amount expected   | Prospect tab,<br>Proposal |                                                                                                                                       |
| Proposal Amounts – Amount Funded   | Prospect tab,<br>Proposal button | Amount funded     | Prospect tab,<br>Proposal |                                                                                                                                       |
| Proposal Amounts – Date Asked      | Prospect tab,<br>Proposal button | Date asked        | Prospect tab,<br>Proposal |                                                                                                                                       |

| RE 6.42 Field                    | RE 6.42 Location                           | RE 7 Field              | RE 7 Location                      | Comments |
|----------------------------------|--------------------------------------------|-------------------------|------------------------------------|----------|
| Proposal Amounts – Date Expected | Prospect tab, Proposal button              | Date expected           | Prospect tab, Proposal             |          |
| Proposal Amounts – Date Funded   | Prospect tab, Proposal button              | Date funded             | Prospect tab, Proposal             |          |
| N\A                              | N\A                                        | Proposal is inactive    | Prospect tab, Proposal             |          |
| Actions                          | Prospect tab, Proposal tab, Actions button | Linked Actions          | Prospect tab, Actions tab          |          |
| N\A                              | N\A                                        | Linked Media            | Prospect tab, Media tab            |          |
| N\A                              | N\A                                        | Linked Attributes/Notes | Prospect tab, Attributes/Notes tab |          |
| Rating – Source                  | Prospect tab, Ratings button               | Source                  | Prospect tab, Rating               |          |
| Rating – Date                    | Prospect tab, Ratings button               | Date                    | Prospect tab, Rating               |          |
| Rating – Category                | Prospect tab, Ratings button               | Category                | Prospect tab, Rating               |          |
| Rating – Description             | Prospect tab, Ratings button               | Description             | Prospect tab, Rating               |          |
| Rating – Notes                   | Prospect tab, Ratings button               | Notes                   | Prospect tab, Rating               |          |

## Membership

| RE 6.42 Field                | RE 6.42 Location | RE 7 Field                        | RE 7 Location                             | Comments |
|------------------------------|------------------|-----------------------------------|-------------------------------------------|----------|
| Type                         | Membership tab   | Activity type or Transaction type | Membership tab                            |          |
| Membership Dues              | Membership tab   | Dues                              | Membership tab                            |          |
| N\A                          | N\A              | Program                           | Membership tab                            |          |
| Category                     | Membership tab   | Category                          | Membership tab                            |          |
| N\A                          | N\A              | Subcategory                       | Membership tab                            |          |
| Date Joined                  | Membership tab   | Date Joined                       | Membership tab                            |          |
| N\A                          | N\A              | Lifetime                          | Membership tab                            |          |
| Expires On                   | Membership tab   | Expires on                        | Membership tab                            |          |
| N\A                          | N\A              | Print renewal notices             | Membership tab                            |          |
| N\A                          | N\A              | Solicitors                        | Membership tab                            |          |
| Benefits                     | Membership tab   | Benefits grid                     | Membership tab, Benefits button           |          |
| N\A                          | N\A              | Waive benefits                    | Membership tab, Benefits button           |          |
| N\A                          | N\A              | Send benefits to                  | Membership tab, Benefits button           |          |
| Membership Cards Printed     | Membership tab   | Status                            | Membership tab, Members & Cards button    |          |
| Membership ID                | Membership tab   | Membership ID                     | Membership tab                            |          |
| Create Link to Gift          | Membership tab   | Link to Gift button               | Membership tab, Link to Gift button       |          |
| Membership Given By          | Membership tab   | Membership gift from              | Membership tab, Gift of Membership button |          |
| N\A                          | N\A              | Special message                   | Membership tab, Gift of Membership button |          |
| Send Renewal Notice To Donor | Membership tab   | Send renewal notices to Donor     | Membership tab, Gift of Membership button |          |



| RE 6.42 Field                 | RE 6.42 Location | RE 7 Field                             | RE 7 Location                             | Comments                                                                                                                                                |
|-------------------------------|------------------|----------------------------------------|-------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------|
| Send Renewal Notice to Member | Membership tab   | Send renewal notices to Primary member | Membership tab, Gift of Membership button |                                                                                                                                                         |
| N\A                           | N\A              | Send renewal notices to Both           | Membership tab, Gift of Membership button | No equivalent for this in 6.4x. If both the <b>Member</b> and <b>Donor</b> checkboxes are marked in 6.x, this checkbox is marked during the conversion. |
| Renewal Letter                | Membership tab   | Renewal History Grid, Renewal Letter   | Membership tab, Past Renewals button      |                                                                                                                                                         |
| Renewal Date                  | Membership tab   | Renewal History Grid, Date             | Membership tab, Past Renewals button      |                                                                                                                                                         |
| N\A                           | N\A              | Renewal History Grid, Name on Renewal  | Membership tab, Past Renewals button      |                                                                                                                                                         |
| N\A                           | N\A              | Renewal History Grid, Sent to          | Membership tab, Past Renewals button      |                                                                                                                                                         |
| Renewed On                    | Membership tab   | Renewed on                             | Membership tab                            |                                                                                                                                                         |
| Renew Type                    | Membership tab   | This renewal is a(n)                   | Membership tab, Renew Option              |                                                                                                                                                         |
| Reason Drop                   | Membership tab   | Reason                                 | Membership tab, Drop Option               |                                                                                                                                                         |
| Dropped On                    | Membership tab   | Date dropped                           | Membership tab, Drop Option               |                                                                                                                                                         |
| Comments                      | Membership tab   | Comments                               | Membership tab, Drop Option               |                                                                                                                                                         |
| Rejoined On                   | Membership tab   | Rejoined on                            | Membership tab, Rejoin Option             |                                                                                                                                                         |
| N\A                           | N\A              | Reason                                 | Membership tab                            |                                                                                                                                                         |
| N\A                           | N\A              | Comment                                | Membership tab                            |                                                                                                                                                         |
| N\A                           | N\A              | This rejoin is a(n)                    | Membership tab, Rejoin Option             |                                                                                                                                                         |

| RE 6.42 Field                               | RE 6.42 Location                 | RE 7 Field       | RE 7 Location                                                          | Comments                                                 |
|---------------------------------------------|----------------------------------|------------------|------------------------------------------------------------------------|----------------------------------------------------------|
| Upgraded on                                 | Membership tab                   | Upgraded on      | Membership tab                                                         |                                                          |
| Downgraded on                               | Membership tab                   | Downgraded on    | Membership tab                                                         |                                                          |
| Membership card list – Name on Card         | Membership tab, Mem Cards button | Name             | Membership tab, Members & Cards button                                 |                                                          |
| N\A                                         | N\A                              | Relationship     | Membership tab, Members & Cards button                                 |                                                          |
| Membership card list – Print member address | Membership tab, Mem Cards button | Address to print | Membership tab, Members & Cards button                                 |                                                          |
| N\A                                         | N\A                              | Card Expires     | Membership tab, Members & Cards button, Joint Member or Card recipient | Defaults to “same as membership”.                        |
| N\A                                         | N\A                              | Valid from       | Membership tab, Members & Cards button, Joint Member or Card recipient | Defaults to the start date of the last transaction.      |
| N\A                                         | N\A                              | Valid to         | Membership tab, Members & Cards button, Joint Member or Card recipient | Defaults to the expires on date of the last transaction. |
| # Cards                                     | Membership tab, Mem Cards button | Number to print  | Membership tab, Members & Cards button                                 |                                                          |
| N\A                                         | N\A                              | Type             | Membership tab, Members & Cards button                                 |                                                          |
| N\A                                         | N\A                              | Editable         | Membership tab, Members & Cards button                                 |                                                          |
| N\A                                         | N\A                              | Card/pass valid  | Membership tab, Members & Cards button                                 |                                                          |
| N\A                                         | N\A                              | To               | Membership tab, Members & Cards button                                 |                                                          |

| RE 6.42 Field | RE 6.42 Location | RE 7 Field                | RE 7 Location                          | Comments |
|---------------|------------------|---------------------------|----------------------------------------|----------|
| N\A           | N\A              | Joint Member checkbox     | Membership tab, Members & Cards button |          |
| N\A           | N\A              | Card/Guest Pass Recipient | Membership tab, Members & Cards button |          |

## Events

In order to retain all Event information, Events will convert as sporting events.

| RE 6.42 Field | RE 6.42 Location        | RE 7 Field         | RE 7 Location                              | Comments |
|---------------|-------------------------|--------------------|--------------------------------------------|----------|
| Event Name    | Event Module, Event tab | Name               | Event Record, General tab                  |          |
| Event ID      | Event Module, Event tab | ID                 | Event Record, General tab                  |          |
| Description   | Event Module, Event tab | Description        | Event Record, General tab                  |          |
| Event Type    | Event Module, Event tab | Type               | Event Record, General tab                  |          |
| Group         | Event Module, Event tab | Group              | Event Record, General tab                  |          |
| Location      | Event Module, Event tab | Location           | Event Record, General tab, Location button |          |
| N\A           | N\A                     | Location – Country | Event Record, General tab, Location button |          |
| N\A           | N\A                     | Location – Address | Event Record, General tab, Location button |          |
| N\A           | N\A                     | Location – City    | Event Record, General tab, Location button |          |
| N\A           | N\A                     | Location – State   | Event Record, General tab, Location button |          |
| N\A           | N\A                     | Location – Zip     | Event Record, General tab, Location button |          |

| RE 6.42 Field | RE 6.42 Location           | RE 7 Field                       | RE 7 Location                                    | Comments |
|---------------|----------------------------|----------------------------------|--------------------------------------------------|----------|
| N\A           | N\A                        | Location – Phone                 | Event Record,<br>General tab,<br>Location button |          |
| N\A           | N\A                        | Location – Contact               | Event Record,<br>General tab,<br>Location button |          |
| N\A           | N\A                        | Location – Notes                 | Event Record,<br>General tab,<br>Location button |          |
| N\A           | N\A                        | Itinerary desc                   | Event Record,<br>General tab                     |          |
| Capacity      | Event Module,<br>Event tab | Capacity                         | Event Record,<br>General tab                     |          |
| # Invited     | Event Module,<br>Event tab | No. invited                      | Event Record,<br>General tab                     |          |
| Event Goal    | Event Module,<br>Event tab | Event goal                       | Event Record,<br>General tab                     |          |
| N\A           | N\A                        | Event is inactive                | Event Record,<br>General tab                     |          |
| N\A           | N\A                        | Display on Calendar<br>of Events | Event Record,<br>General tab                     |          |
| Campaign      | Event Module,<br>Event tab | Default Campaign                 | Default gift set                                 |          |
| Fund          | Event Module,<br>Event tab | Default Fund                     | Default gift set                                 |          |
| N\A           | N\A                        | Default receipt<br>amount        | Event Menu<br>Option, Gift<br>Defaults           |          |
| Start Date    | Event Module,<br>Event tab | Start date                       | Event Record,<br>General tab                     |          |
| End Date      | Event Module,<br>Event tab | End date                         | Event Record,<br>General tab                     |          |
| Start Time    | Event Module,<br>Event tab | Start time                       | Event Record,<br>General tab                     |          |
| End Time      | Event Module,<br>Event tab | End time                         | Event Record,<br>General tab                     |          |

| RE 6.42 Field | RE 6.42 Location | RE 7 Field                                  | RE 7 Location                                                                | Comments |
|---------------|------------------|---------------------------------------------|------------------------------------------------------------------------------|----------|
| N\A           | N\A              | Schedule                                    | Event Record, General tab (for Category of Class only), Schedule button      |          |
| N\A           | N\A              | Instructors                                 | Event Record, General tab (for Category of Class only), Instructors button   |          |
| N\A           | N\A              | Instructors – Comments                      | Event Record, General tab (for Category of Class only), Instructors button   |          |
| N\A           | N\A              | Coordinators – Name                         | Event Record, General tab, Coordinators button                               |          |
| N\A           | N\A              | Coordinators Comments –                     | Event Record, General tab, Coordinators button                               |          |
| N\A           | N\A              | Seating – Tables, No. of sections           | Event Record, General tab; Participant Record, General 2 tab, Seating button |          |
| N\A           | N\A              | Seating – Tables, No. of tables per section | Event Record, General tab; Participant Record, General 2 tab, Seating button |          |
| N\A           | N\A              | Seating – Tables, No. of seats per table    | Event Record, General tab; Participant Record, General 2 tab, Seating button |          |
| N\A           | N\A              | Seating – Tables, Rows. No. of sections     | Event Record, General tab; Participant Record, General 2 tab, Seating button |          |

| RE 6.42 Field          | RE 6.42 Location              | RE 7 Field                                              | RE 7 Location                                                                            | Comments |
|------------------------|-------------------------------|---------------------------------------------------------|------------------------------------------------------------------------------------------|----------|
| N\A                    | N\A                           | Seating – Tables,<br>Rows. No. of rows<br>per section   | Event Record,<br>General tab;<br>Participant Record,<br>General 2 tab,<br>Seating button |          |
| N\A                    | N\A                           | Seating – Tables,<br>Rows. No. of seats<br>per row      | Event Record,<br>General tab;<br>Participant Record,<br>General 2 tab,<br>Seating button |          |
| N\A                    | N\A                           | Seating – Tables,<br>Other. No. of<br>sections          | Event Record,<br>General tab;<br>Participant Record,<br>General 2 tab,<br>Seating button |          |
| N\A                    | N\A                           | Seating – Tables,<br>Other. No. of seats<br>per section | Event Record,<br>General tab;<br>Participant Record,<br>General 2 tab,<br>Seating button |          |
| Price – Unit           | Event Module,<br>Prices tab   | Unit                                                    | Event Record,<br>Prices tab                                                              |          |
| Price – Price          | Event Module,<br>Prices tab   | Gift Amount                                             | Event Record,<br>Prices tab                                                              |          |
| Price – Donation       | Event Module,<br>Prices tab   | Receipt Amount                                          | Event Record,<br>Prices tab                                                              |          |
| Price – Comment        | Event Module,<br>Prices tab   | Comment                                                 | Event Record,<br>Prices tab                                                              |          |
| Expenses – Type        | Event Module,<br>Expenses tab | Expense Type                                            | Event Record,<br>Expenses tab                                                            |          |
| Expenses – Expense     | Event Module,<br>Expenses tab | Expense                                                 | Event Record,<br>Expenses tab                                                            |          |
| Expenses –<br>Budgeted | Event Module,<br>Expenses tab | Budgeted                                                | Event Record,<br>Expenses tab                                                            |          |
| N\A                    | N\A                           | Paid                                                    | Event Record,<br>Expenses tab                                                            |          |
| Expenses Date          | Event Module,<br>Expenses tab | Date                                                    | Event Record,<br>Expenses tab                                                            |          |
| N\A                    | N\A                           | Vendor                                                  | Event Record,<br>Expenses tab                                                            |          |

| RE 6.42 Field                | RE 6.42 Location              | RE 7 Field        | RE 7 Location                                                     | Comments |
|------------------------------|-------------------------------|-------------------|-------------------------------------------------------------------|----------|
| Expenses – Comment           | Event Module, Expenses tab    | Comment           | Event Record, Expenses tab                                        |          |
| Attribute – Category         | Event Module, Attributes tab  | Category          | Event Record, Attributes tab                                      |          |
| Attribute – Description      | Event Module, Attributes tab  | Description       | Event Record, Attributes tab                                      |          |
| N\A                          | N\A                           | Short Desc.       | Event Record, Attributes tab                                      |          |
| N\A                          | N\A                           | Date              | Event Record, Attributes tab                                      |          |
| Attribute – Comment          | Event Module, Attributes tab  | Comments          | Event Record, Attributes tab                                      |          |
| N\A                          | N\A                           | Notes             | Event Record, Notes tab                                           |          |
| N\A                          | N\A                           | Media information | Event Record, Media tab                                           |          |
| Registrant – Registrant Name | Event Module, Registrants tab | Name              | Event Record, Participants tab, Participant Record, General 1 tab |          |
| Registrant – Sort Key        | Event Module, Registrants tab | N\A               | N\A                                                               |          |
| Registrant – Sponsored by    | Event Module, Registrants tab | Sponsored by      | Event Record, Participants tab, Participant Record, General 1 tab |          |
| Registrant – Sort Key        | Event Module, Registrants tab | N\A               | N\A                                                               |          |
| N\A                          | N\A                           | Solicitor         | Event Record, Participants tab, Participant Record, General 1 tab |          |
| Registrant – Participation   | Event Module, Registrants tab | Participation     | Event Record, Participants tab, Participant Record, General 1 tab |          |
| Registrant – Status          | Event Module, Registrants tab | Status            | Event Record, Participants tab, Participant Record, General 1 tab |          |

| RE 6.42 Field | RE 6.42 Location | RE 7 Field                      | RE 7 Location                                                              | Comments                                                                 |
|---------------|------------------|---------------------------------|----------------------------------------------------------------------------|--------------------------------------------------------------------------|
| N\A           | N\A              | Invite?                         | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab |                                                                          |
| N\A           | N\A              | Invite? Date                    | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab |                                                                          |
| NA            | N\A              | Response                        | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab |                                                                          |
| N\A           | N\A              | Response date                   | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab |                                                                          |
| N\A           | N\A              | Grade                           | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab | Available only on<br>Participant records<br>with a category of<br>Class. |
| N\A           | N\A              | Participant is an<br>instructor | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab | Available only on<br>Participant records<br>with a category of<br>Class. |
| N\A           | N\A              | Address                         | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab |                                                                          |
| N\A           | N\A              | Phones/Email Links              | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab |                                                                          |
| N\A           | N\A              | Send event<br>reminders         | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab |                                                                          |
| N\A           | N\A              | Contact                         | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab | This field is<br>available only for<br>Organizations.                    |



| RE 6.42 Field                        | RE 6.42 Location                | RE 7 Field      | RE 7 Location                                                                                   | Comments                                                                                             |
|--------------------------------------|---------------------------------|-----------------|-------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------|
| N\A                                  | N\A                             | Assigned number | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>More Info button | Available only for<br>Sporting Events.                                                               |
| N\A                                  | N\A                             | Age             | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>More Info button | Available only for<br>Sporting Events.                                                               |
| N\A                                  | N\A                             | Weight          | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>More Info button | Available only for<br>Sporting Events.                                                               |
| N\A                                  | N\A                             | Ability rating  | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>More Info button | Available only for<br>Sporting Events.                                                               |
| N\A                                  | N\A                             | Start time      | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>More Info button | Available only for<br>Sporting Events.                                                               |
| N\A                                  | N\A                             | Place           | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>More Info button | Available only for<br>Sporting Events.                                                               |
| N\A                                  | N\A                             | Location        | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>More Info button | Available only for<br>Sporting Events.                                                               |
| Registrant<br>Assignments –<br>Table | Event Module,<br>Registrant tab | Seating         | Event Record,<br>Participants tab,<br>Participant Record,<br>General 2 tab,<br>Seating button   | This is converted as<br>a registrant<br>attribute of<br>Conversion –<br>Registrant Seating<br>Table. |
| Registrant<br>Assignments –<br>Seat  | Event Module,<br>Registrant tab | Seating         | Event Record,<br>Participants tab,<br>Participant Record,<br>General 2 tab,<br>Seating button   | This is converted as<br>a registrant<br>attribute of<br>Conversion –<br>Registrant Seating<br>Seat.  |

| RE 6.42 Field                     | RE 6.42 Location             | RE 7 Field                  | RE 7 Location                                                                       | Comments                                                                                |
|-----------------------------------|------------------------------|-----------------------------|-------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------|
| Registrant Assignments – Section  | Event Module, Registrant tab | Seating                     | Event Record, Participants tab, Participant Record, General 2 tab, Seating button   | This is converted as a registrant attribute of Conversion – Registrant Seating Section. |
| Registrants Assignments – Row     | Event Module, Registrant tab | Seating                     | Event Record, Participants tab, Participant Record, General 2 tab, Seating button   | This is converted as a registrant attribute of Conversion – Registrant Seating Row.     |
| Registrant Assignments – Division | Event Module, Registrant tab | Team Information - Division | Event Record, Participants tab, Participant Record, General 1 tab, More Info button | Available only for Sporting Events.                                                     |
| Registrant Assignments – Team     | Event Module, Registrant tab | Team Information – Team     | Event Record, Participants tab, Participant Record, General 1 tab, More Info button | Available only for Sporting Events.                                                     |
| N\A                               | N\A                          | Team Information – Position | Event Record, Participants tab, Participant Record, General 1 tab, More Info button | Available only for Sporting Events.                                                     |
| N\A                               | N\A                          | Dinner Preference           | Event Record, Participants tab, Participant Record, General 1 tab, More Info button | Available only for Dinner Events.                                                       |
| N\A                               | N\A                          | Quantity                    | Event Record, Participants tab, Participant Record, General 1 tab, More Info button | Available only for Dinner Events.s                                                      |
| N\A                               | N\A                          | Comments                    | Event Record, Participants tab, Participant Record, General 1 tab, More Info button | Available only for Dinner Events.                                                       |
| Prize                             | Event Module, Registrant tab | Award                       | Event Record, Participants tab, Participant Record, General 1 tab, Awards button    |                                                                                         |

| RE 6.42 Field | RE 6.42 Location | RE 7 Field        | RE 7 Location                                                                                    | Comments |
|---------------|------------------|-------------------|--------------------------------------------------------------------------------------------------|----------|
| N\A           | N\A              | Presented by      | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>Awards button     |          |
| N\A           | N\A              | Comments          | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>Award button      |          |
| N\A           | N\A              | Print Name Tags   | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>Tags/Cards button |          |
| N\A           | N\A              | Name to print     | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>Tags/Cards button |          |
| N\A           | N\A              | Editable?         | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>Tags/Cards button |          |
| N\A           | N\A              | No. tags to print | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>Tags/Cards button |          |
| N\A           | N\A              | Status            | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>Tags/Cards button |          |
| N\A           | N\A              | Print Place Cards | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>Tags/Cards button |          |
| N\A           | N\A              | Name to print     | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>Tags/Cards button |          |

| RE 6.42 Field | RE 6.42 Location | RE 7 Field                                               | RE 7 Location                                                                                    | Comments                                  |
|---------------|------------------|----------------------------------------------------------|--------------------------------------------------------------------------------------------------|-------------------------------------------|
| N\A           | N\A              | Editable?                                                | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>Tags/Cards button |                                           |
| N\A           | N\A              | No. cards to print                                       | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>Tags/Cards button |                                           |
| N\A           | N\A              | Status                                                   | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>Tags/Cards button |                                           |
| N\A           | N\A              | Guest – Name                                             | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>Guests button     | Available only for<br>Registrant Records. |
| N\A           | N\A              | Guest – Create a<br>participant record<br>for this guest | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>Guests button     | Available only for<br>Registrant Records. |
| N\A           | N\A              | Guest – Total<br>guests                                  | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>Guests button     | Available only for<br>Registrant Records. |
| N\A           | N\A              | Guest –<br>Registration                                  | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>Guests button     | Available only for<br>Registrant Records. |
| N\A           | N\A              | Guest – Date (for<br>registration)                       | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>Guests button     | Available only for<br>Registrant Records. |
| N\A           | N\A              | Guest – This guest<br>has attended                       | Event Record,<br>Participants tab,<br>Participant Record,<br>General 1 tab,<br>Guests button     | Available only for<br>Registrant Records. |

| RE 6.42 Field | RE 6.42 Location | RE 7 Field                              | RE 7 Location                                                                    | Comments                               |
|---------------|------------------|-----------------------------------------|----------------------------------------------------------------------------------|----------------------------------------|
| N\A           | N\A              | Guest – Print Name Tags                 | Event Record, Participants tab, Participant Record, General 1 tab, Guests button | Available only for Registrant Records. |
| N\A           | N\A              | Guest – Name Tags, Name to print        | Event Record, Participants tab, Participant Record, General 1 tab, Guests button | Available only for Registrant Records. |
| N\A           | N\A              | Guest – Name Tags, Editable?            | Event Record, Participants tab, Participant Record, General 1 tab, Guests button | Available only for Registrant Records. |
| N\A           | N\A              | Guest – Name Tags, No. tags to print    | Event Record, Participants tab, Participant Record, General 1 tab, Guests button | Available only for Registrant Records. |
| N\A           | N\A              | Guest – Name Tags, Status               | Event Record, Participants tab, Participant Record, General 1 tab, Guests button | Available only for Registrant Records. |
| N\A           | N\A              | Guest – Print Place Cards               | Event Record, Participants tab, Participant Record, General 1 tab, Guests button | Available only for Registrant Records. |
| N\A           | N\A              | Guest – Place Cards, Name to print      | Event Record, Participants tab, Participant Record, General 1 tab, Guests button | Available only for Registrant Records. |
| N\A           | N\A              | Guest – Place Cards, Editable?          | Event Record, Participants tab, Participant Record, General 1 tab, Guests button | Available only for Registrant Records. |
| N\A           | N\A              | Guest – Place Cards, No. cards to print | Event Record, Participants tab, Participant Record, General 1 tab, Guests button | Available only for Registrant Records. |

| RE 6.42 Field            | RE 6.42 Location               | RE 7 Field                  | RE 7 Location                                                                    | Comments                               |
|--------------------------|--------------------------------|-----------------------------|----------------------------------------------------------------------------------|----------------------------------------|
| N\A                      | N\A                            | Guest – Place Cards, Status | Event Record, Participants tab, Participant Record, General 1 tab, Guests button | Available only for Registrant Records. |
| Registrant – Event Unit  | Events Module, Registrants tab | Unit                        | Event Record, Participants tab, Participant Record, Registration Fees tab        |                                        |
| Registrant – # of Units  | Events Module, Registrants tab | No. Units                   | Event Record, Participants tab, Participant Record, Registration Fees tab        |                                        |
| Registrant – Amount      | Events Module, Registrants tab | Gift Amount                 | Event Record, Participants tab, Participant Record, Registration Fees tab        |                                        |
| Registrant – Amount Paid | Events Module, Registrants tab | Amount Paid                 | Event Record, Participants tab, Participant Record, Registration Fees tab        |                                        |
| Registrant – Date Paid   | Events Module, Registrants tab | Date paid                   | Event Record, Participants tab, Participant Record, Registration Fees tab        |                                        |
| Registrant – Donation    | Events Module, Registrants tab | Receipt Amount              | Event Record, Participants tab, Participant Record, Registration Fees tab        |                                        |
| N\A                      | N\A                            | Date                        | Event Record, Participants tab, Participant Record, Registration Fees tab        |                                        |
| N\A                      | N\A                            | Comments                    | Event Record, Participants tab, Participant Record, Registration Fees tab        |                                        |

| RE 6.42 Field | RE 6.42 Location | RE 7 Field           | RE 7 Location                                                                                             | Comments |
|---------------|------------------|----------------------|-----------------------------------------------------------------------------------------------------------|----------|
| N\A           | N\A              | Apply discount       | Event Record,<br>Participants tab,<br>Participant Record,<br>Registration Fees<br>tab                     |          |
| N\A           | N\A              | Amount option        | Event Record,<br>Participants tab,<br>Participant Record,<br>Registration Fees<br>tab                     |          |
| N\A           | N\A              | Percent option       | Event Record,<br>Participants tab,<br>Participant Record,<br>Registration Fees<br>tab                     |          |
| N\A           | N\A              | Amount field         | Event Record,<br>Participants tab,<br>Participant Record,<br>Registration Fees<br>tab                     |          |
| N\A           | N\A              | Percent field        | Event Record,<br>Participants tab,<br>Participant Record,<br>Registration Fees<br>tab                     |          |
| N\A           | N\A              | Waive benefits       | Event Record,<br>Participants tab,<br>Participant Record,<br>Registration Fees<br>tab                     |          |
| N\A           | N\A              | Registrant – Benefit | Event Record,<br>Participants tab,<br>Participant Record,<br>Registration Fees<br>tab, Benefits<br>button |          |
| N\A           | N\A              | Count                | Event Record,<br>Participants tab,<br>Participant Record,<br>Registration Fees<br>tab, Benefits<br>button |          |

| RE 6.42 Field | RE 6.42 Location | RE 7 Field          | RE 7 Location                                                                                             | Comments |
|---------------|------------------|---------------------|-----------------------------------------------------------------------------------------------------------|----------|
| N\A           | N\A              | Unit Cost           | Event Record,<br>Participants tab,<br>Participant Record,<br>Registration Fees<br>tab, Benefits<br>button |          |
| N\A           | N\A              | Total Benefit/Value | Event Record,<br>Participants tab,<br>Participant Record,<br>Registration Fees<br>tab, Benefits<br>button |          |
| N\A           | N\A              | Sent/Fulfilled      | Event Record,<br>Participants tab,<br>Participant Record,<br>Registration Fees<br>tab, Benefits<br>button |          |
| N\A           | N\A              | Comments            | Event Record,<br>Participants tab,<br>Participant Record,<br>Registration Fees<br>tab, Benefits<br>button |          |
| N\A           | N\A              | Notes               | Event Record,<br>Participants tab,<br>Participant Record,<br>Registration Fees<br>tab, Benefits<br>button |          |
| N\A           | N\A              | Other donations     | Event Record,<br>Participants tab,<br>Participant Record,<br>Donations tab                                |          |
| N\A           | N\A              | Constituent         | Event Record,<br>Participants tab,<br>Participant Record,<br>Sponsoring Pledges<br>tab                    |          |
| N\A           | N\A              | Pledge Amount       | Event Record,<br>Participants tab,<br>Participant Record,<br>Sponsoring Pledges<br>tab                    |          |



| RE 6.42 Field                          | RE 6.42 Location                 | RE 7 Field                          | RE 7 Location                                                                            | Comments |
|----------------------------------------|----------------------------------|-------------------------------------|------------------------------------------------------------------------------------------|----------|
| N\A                                    | N\A                              | Amount Paid                         | Event Record,<br>Participants tab,<br>Participant Record,<br>Sponsoring Pledges<br>tab   |          |
| N\A                                    | N\A                              | Balance                             | Event Record,<br>Participants tab,<br>Participant Record,<br>Sponsoring Pledges<br>tab   |          |
| N\A                                    | N\A                              | Only show<br>outstanding<br>pledges | Event Record,<br>Participants tab,<br>Participant Record,<br>Sponsoring Pledges<br>tab   |          |
| Registrant<br>Assignments –<br>Table   | Event Module,<br>Registrants tab | Table                               | Event Record,<br>General tab,<br>Participant Record,<br>General 2 tab,<br>Seating button |          |
| Registrant<br>Assignments –Seat        | Event Module,<br>Registrants tab | Seat Number                         | Event Record,<br>General tab,<br>Participant Record,<br>General 2 tab,<br>Seating button |          |
| Registrant<br>Assignments –<br>Section | Event Module,<br>Registrants tab | Section Number                      | Event Record,<br>General tab,<br>Participant Record,<br>General 2 tab,<br>Seating button |          |
| N\A                                    | N\A                              | Section Name                        | Event Record,<br>General tab,<br>Participant Record,<br>General 2 tab,<br>Seating button |          |
| Registrant<br>Assignments – Row        | Event Module,<br>Registrants tab | Row Number                          | Event Record,<br>General tab,<br>Participant Record,<br>General 2 tab,<br>Seating button |          |
| N\A                                    | N\A                              | Row Name                            | Event Record,<br>General tab,<br>Participant Record,<br>General 2 tab,<br>Seating button |          |

| RE 6.42 Field                    | RE 6.42 Location              | RE 7 Field                   | RE 7 Location                                                | Comments                                 |
|----------------------------------|-------------------------------|------------------------------|--------------------------------------------------------------|------------------------------------------|
| N\A                              | N\A                           | Do not seat this participant | Event Record, General tab, Participant Record, General 2 tab |                                          |
| N\A                              | N\A                           | Seating Group                | Event Record, General tab, Participant Record, General 2 tab |                                          |
| N\A                              | N\A                           | Group/seating notes          | Event Record, General tab, Participant Record, General 2 tab |                                          |
| Registrant Assignments – Lodging | Event Module, Registrants tab | Name                         | Event Record, General tab, Participant Record, General 2 tab |                                          |
| Registrant Assignments – Room #  | Event Module, Registrants tab | Room no.                     | Event Record, General tab, Participant Record, General 2 tab |                                          |
| N\A                              | N\A                           | Phone no.                    | Event Record, General tab, Participant Record, General 2 tab |                                          |
| N\A                              | N\A                           | Confirmation no.             | Event Record, General tab, Participant Record, General 2 tab |                                          |
| N\A                              | N\A                           | Check in date/time           | Event Record, General tab, Participant Record, General 2 tab |                                          |
| N\A                              | N\A                           | Check out date/time          | Event Record, General tab, Participant Record, General 2 tab | No equivalent in 6.4x, so this is blank. |
| N\A                              | N\A                           | Arrival Type                 | Event Record, General tab, Participant Record, General 2 tab | No equivalent in 6.4x, so this is blank. |
| N\A                              | N\A                           | Arrival Name                 | Event Record, General tab, Participant Record, General 2 tab | No equivalent in 6.4x, so this is blank. |

| RE 6.42 Field             | RE 6.42 Location      | RE 7 Field                   | RE 7 Location                                                         | Comments                                 |
|---------------------------|-----------------------|------------------------------|-----------------------------------------------------------------------|------------------------------------------|
| N\A                       | N\A                   | Arrival Number               | Event Record,<br>General tab,<br>Participant Record,<br>General 2 tab | No equivalent in 6.4x, so this is blank. |
| N\A                       | N\A                   | Arrival date                 | Event Record,<br>General tab,<br>Participant Record,<br>General 2 tab | No equivalent in 6.4x, so this is blank. |
| N\A                       | N\A                   | Arrival time                 | Event Record,<br>General tab,<br>Participant Record,<br>General 2 tab | No equivalent in 6.4x, so this is blank. |
| N\A                       | N\A                   | Departure Type               | Event Record,<br>General tab,<br>Participant Record,<br>General 2 tab | No equivalent in 6.4x, so this is blank. |
| N\A                       | N\A                   | Departure Name               | Event Record,<br>General tab,<br>Participant Record,<br>General 2 tab | No equivalent in 6.4x, so this is blank. |
| N\A                       | N\A                   | Departure Number             | Event Record,<br>General tab,<br>Participant Record,<br>General 2 tab | No equivalent in 6.4x, so this is blank. |
| N\A                       | N\A                   | Departure Date               | Event Record,<br>General tab,<br>Participant Record,<br>General 2 tab | No equivalent in 6.4x, so this is blank. |
| N\A                       | N\A                   | Departure Time               | Event Record,<br>General tab,<br>Participant Record,<br>General 2 tab | No equivalent in 6.4x, so this is blank. |
| Individual has Registered | Registrant Registered | Registration                 | Event Record,<br>General tab,<br>Participant Record,<br>General 1 tab |                                          |
| Individual has Attended   | Registrant Attended   | Participant has attended     | Event Record,<br>General tab,<br>Participant Record,<br>General 1 tab |                                          |
| N/A                       | N/A                   | Participant is a coordinator | Event Record,<br>General tab,<br>Participant Record,<br>General 1 tab | No equivalent in 6.4x, so this is blank. |

| RE 6.42 Field | RE 6.42 Location | RE 7 Field                                | RE 7 Location                                      | Comments                                 |
|---------------|------------------|-------------------------------------------|----------------------------------------------------|------------------------------------------|
| N/A           | N/A              | Participant is a Speaker for this Event   | Event Record, Participants tab, Participant Record | No equivalent in 6.4x, so this is blank. |
| N/A           | N/A              | Topic                                     | Event Record, Participants tab, Participant Record | No equivalent in 6.4x, so this is blank. |
| N/A           | N/A              | Time                                      | Event Record, Participants tab, Participant Record | No equivalent in 6.4x, so this is blank. |
| N/A           | N/A              | Comments                                  | Event Record, Participants tab, Participant Record | No equivalent in 6.4x, so this is blank. |
| N/A           | N/A              | Participant is a Vendor for this Event    | Event Record, Participants tab, Participant Record | No equivalent in 6.4x, so this is blank. |
| N/A           | N/A              | Space no.                                 | Event Record, Participant tab, Participation tab   | No equivalent in 6.4x, so this is blank. |
| N/A           | N/A              | Booth no.                                 | Event Record, Participants tab, Participant Record | No equivalent in 6.4x, so this is blank. |
| N/A           | N/A              | Purpose                                   | Event Record, Participants tab, Participant Record | No equivalent in 6.4x, so this is blank. |
| N/A           | N/A              | Rating                                    | Event Record, Participants tab, Participant Record | No equivalent in 6.4x, so this is blank. |
| N/A           | N/A              | Comments                                  | Event Record, Participants tab, Participant Record | No equivalent in 6.4x, so this is blank. |
| N/A           | N/A              | Participant is a Volunteer for this Event | Event Record, Participants tab, Participant Record | No equivalent in 6.4x, so this is blank. |

| RE 6.42 Field                     | RE 6.42 Location               | RE 7 Field           | RE 7 Location                                                       | Comments                                                                                                                                                                                                       |
|-----------------------------------|--------------------------------|----------------------|---------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| N/A                               | N/A                            | Vendor Expenses Grid | Event Record, Participants tab, Participant Record                  | The vendor expenses are linked to the expense for the overall event. Version 6.4x does not have a specific field for vendor name so this grid is blank even though the event may have the expenses filled out. |
| Registrant Attributes Category    | Registrant Attributes          | Category             | Event Record, Participants tab, Participant Record, Attributes grid |                                                                                                                                                                                                                |
| Registrant Attributes Description | Attribute Types Description    | Description          | Event Record, Participants tab, Participant Record, Attributes grid |                                                                                                                                                                                                                |
| N/A                               | N/A                            | Short Desc           | Event Record, Participants tab, Participant Record, Attributes grid | No equivalent in 6.4x, so this is blank.                                                                                                                                                                       |
| N/A                               | N/A                            | Date                 | Event Record, Participants tab, Participant Record, Attributes grid | No equivalent in 6.4x, so this is blank.                                                                                                                                                                       |
| Registrant Attributes Comment     | Registrant Attributes Comments | Comments             | Event Record, Participants tab, Participant Record, Attributes grid |                                                                                                                                                                                                                |

## Campaigns, Funds, and Appeals

### Appeals

| RE 6.42 Field     | RE 6.42 Location         | RE 7 Field         | RE 7 Location                     | Comments |
|-------------------|--------------------------|--------------------|-----------------------------------|----------|
| Appeal ID         | Appeals tab              | Appeal ID          | Appeals, General tab              |          |
| Description       | Appeals tab              | Description        | Appeals, General tab              |          |
| Goal              | Appeals tab              | Overall goal       | Appeals, General tab              |          |
| Default campaign  | Appeals tab              | Default campaign   | Appeals, General tab              |          |
| Start Date        | Appeals tab              | Start date         | Appeals, General tab              |          |
| End Date          | Appeals tab              | End date           | Appeals, General tab              |          |
| # Solicited       | Appeals tab              | No. solicited      | Appeals, General tab              |          |
| Notes             | Appeals tab              | Notes              | Appeals, General tab              |          |
| Expense           | Appeals tab, General tab | Expense            | Appeals, Attributes/Expense s tab |          |
| N\A               | N\A                      | Package            | Appeals, Attributes/Expense s     |          |
| Comment (Expense) | Appeals tab              | Comment            | Appeals, Attributes/Expense s     |          |
| Date (Expense)    | Appeals tab              | Date               | Appeals, Attributes/Expense s     |          |
| Amount (Expense)  | Appeals tab              | Amount             | Appeals, Attributes/Expense s     |          |
| N\A               | N\A                      | Appeal is inactive | Appeals, General tab              |          |
| N\A               | N\A                      | Appeal category    | Appeals, General tab              |          |

---

| RE 6.42 Field | RE 6.42 Location | RE 7 Field          | RE 7 Location        | Comments |
|---------------|------------------|---------------------|----------------------|----------|
| N\A           | N\A              | Default gift amount | Appeals, General tab |          |
| N\A           | N\A              | Default benefits    | Appeals, General tab |          |
| N\A           | N\A              | Default fund        | Appeals, Fund tab    |          |

## Campaigns

| RE 6.42 Field                     | RE 6.42 Location             | RE 7 Field              | RE 7 Location               | Comments |
|-----------------------------------|------------------------------|-------------------------|-----------------------------|----------|
| Campaign ID                       | Campaign tab                 | Campaign ID             | Campaign, General tab       |          |
| Description                       | Campaign tab                 | Description             | Campaign, General tab       |          |
| Goal                              | Campaign tab                 | Overall goal            | Campaign, General tab       |          |
| Start Date                        | Campaign tab                 | Start date              | Campaign, General tab       |          |
| End Date                          | Campaign tab                 | End date                | Campaign, General tab       |          |
| Default Fund and associated funds | Campaign tab, Funds button   | Associated Funds Grid   | Campaign, Funds tab         |          |
| N\A                               | N\A                          | Campaign is inactive    | Campaign, General tab       |          |
| N\A                               | N\A                          | Notes                   | Campaign, General tab       |          |
| Associated appeals                | Campaign tab, Appeals button | Associated Appeals Grid | Campaign, Appeals tab       |          |
| N\A                               | N\A                          | Solicitors              | Campaign, Solicitors button |          |
| N\A                               | N\A                          | Campaign category       | Campaign, General tab       |          |

## Funds

| RE 6.42 Field | RE 6.42 Location | RE 7 Field    | RE 7 Location      | Comments |
|---------------|------------------|---------------|--------------------|----------|
| Fund ID       | Funds tab        | Funds ID      | Funds, General tab |          |
| Description   | Funds tab        | Description   | Funds, General tab |          |
| Goal          | Funds tab        | Overall goal  | Funds, General tab |          |
| Fund Category | Funds tab        | Fund category | Funds, General tab |          |
| Start Date    | Funds tab        | Start date    | Funds, General tab |          |
| End Date      | Funds tab        | End date      | Funds, General tab |          |



| RE 6.42 Field                             | RE 6.42 Location           | RE 7 Field                                               | RE 7 Location              | Comments |
|-------------------------------------------|----------------------------|----------------------------------------------------------|----------------------------|----------|
| Default Campaign and associated campaigns | Funds tab, Campaign button | Associated Campaigns grid                                | Funds, Campaign tab        |          |
| Restricted                                | Funds tab                  | Fund is restricted                                       | Funds, General tab         |          |
| Notes                                     | Funds tab                  | Notes                                                    | Funds, General tab         |          |
| GL Fund                                   | Funds tab                  | First two digits of the debit and credit account numbers | Funds, GL Distribution tab |          |
| Sub fund                                  | Funds tab                  | Project                                                  | Funds, GL Distribution tab |          |
| N\A                                       | N\A                        | Fund is inactive                                         | Funds, General tab         |          |
| N\A                                       | N\A                        | Solicitors button                                        | Funds, General tab         |          |
| N\A                                       | N\A                        | Transfer                                                 | Funds, GL Distribution tab |          |
| Debit accounts                            | Funds tab                  | Debit Account No.                                        | Funds, GL Distribution tab |          |
| Credit accounts                           | Funds tab                  | Credit Account                                           | Funds, GL Distribution tab |          |

## Export

| Field Name or Program Function                                                                                                                  | RE 6.42 Location                                                                                                                                                                                                          | RE 7 Location                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |
|-------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>Other users may run this export</b> checkbox<br><b>Other users may modify this export</b> checkbox                                           | <b>Edit, Properties</b> , Export Properties screen                                                                                                                                                                        | From the export screen: <b>Tools, Export Options</b> , Export Options screen                                                                                                                                                                                                                                                                                                                                                                                                     |
| <b>Description</b> field - enter a brief description of the export contents                                                                     | <b>Edit, Properties</b> , Export Properties screen, <b>Description</b> field                                                                                                                                              | From the export screen: <b>Tools, Export Options</b> , Export Options screen, <b>Description</b> field                                                                                                                                                                                                                                                                                                                                                                           |
| Export default type - if you frequently create a specific type of export, selecting an export default type can increase the speed of data entry | New Exports frame, Default Type field<br><br>Default types available:<br>Constituent, Gift, Relationship, Special Event                                                                                                   | <b>Tools, User Options</b> , Options screen, <b>Default export type</b> field<br><br>Default types available:<br>Constituent, Gift, Individual Relationship, Action, Campaign, Fund, Appeal, Event                                                                                                                                                                                                                                                                               |
| Define export format                                                                                                                            | In version 6.x, you determine the export format for new exports after you create the export. From the export menu bar, select <b>File, Export</b> . From the Export Format screen, select the data format for the export. | In version 7, you select the export format before you create the export. From the Export page, select <b>New Export</b> . From the Create a New Export screen, select a data format for the export in the <b>Export</b> format field.<br><br>You can change the export format once you create the export. From the export menu bar, select <b>Tools, Export Options</b> . From the Export Options screen, select a data format for the export in the <b>Export</b> format field. |
| Create control report                                                                                                                           | Export Format screen, <b>Create control report</b> checkbox.                                                                                                                                                              | Export screen, General tab, <b>Create control report</b> checkbox. You can mark the <b>Preview</b> option or the <b>Print</b> option if you select to create a control report.                                                                                                                                                                                                                                                                                                   |
| <i>Crystal Report</i> format                                                                                                                    | MS Access Report Writer Database                                                                                                                                                                                          | Blackbaud Report Writer Database                                                                                                                                                                                                                                                                                                                                                                                                                                                 |

| Field Name or Program Function                                                                                                                                                                                                                         | RE 6.42 Location                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  | RE 7 Location                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                            |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <p>Single vs. Separate set of parameters: For certain export fields, you can apply one set of parameters to all selected fields in the category, or you can apply a separate set of parameters to each field in the category you select to export.</p> | <p>In version 6.x, when you select an export field that requires parameters, the Parameter Type screen appears. You can select to apply a single set of parameters to all fields in this category, or you can select to specify the parameters to apply to each field selected in the category.</p> <p>For example, if you select to export the <b>Phone Number</b> field and apply one set of parameters, all other address fields (the field category) will have the same parameters applied. If you select to use a separate set of parameters, you can determine the parameters to use for each address field you select.</p> | <p>In version 7, the terms “single parameter set” and “separate parameter set” are not used. The selection of export fields is more straightforward.</p> <p>When you select an export field that requires parameters, a selection screen appears. You can select to include either all fields that match or only specific fields.</p> <p>You can also easily define different output parameters for each export field. For example, you select to export the <b>Phone Number</b> field. You want to export both the home and business numbers for each constituent in the export. You select the <b>Phone Number</b> field and define the selected phone number for this field as “Home”. Then, scroll to the top of the <b>Output</b> box, and highlight the header entry. Locate the <b>Phone Number</b> field in the <b>Available fields to Export</b> box, select and drag the field to the header entry in the <b>Output</b> box. The graphic changes when you have the field in position. Drop the field in the <b>Output</b> box. The selection screen appears and you define this export field as “Business”. Now, the <b>Output</b> box contains an entry for Phones (the home phone number) and Phones 2 (the business phone number). For detailed information on creating exports, see the <i>Query and Export Guide</i>.</p> |
| <p>Increase, Decrease, Neither options</p>                                                                                                                                                                                                             | <p>When an amount field is selected for export, the Amount Format screen appears. If you mark <b>Increase</b>, the <b>Enter Percentage To Increase Amount</b> field appears. If you mark <b>Decrease</b>, the <b>Enter Percentage To Decrease Amount</b> field appears.</p>                                                                                                                                                                                                                                                                                                                                                       | <p>From the export screen, highlight the amount field selected to export, and click <b>Format</b>. The Amount Format screen appears. You can select the <b>Amount Options: Increase, Decrease, or Neither</b>. If you select <b>Increase</b> or <b>Decrease</b>, the <b>By</b> field is enabled. You can choose to increase or decrease the format by Amount or Percent, and enter the amount or percent to use. You can also mark the <b>Round to whole numbers</b> checkbox.</p>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |

| Field Name or Program Function                     | RE 6.42 Location                                                                                                                       | RE 7 Location                                                                                                                                                                                                                                                     |
|----------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Records to include                                 | New Export screen and Open Export screen                                                                                               | Export screen, General tab, <b>Include</b> button. Click <b>Include</b> to select <b>All Records</b> , <b>Selected Records</b> , or <b>One Record</b> .                                                                                                           |
| Load query output fields                           | New Export screen, <b>Selected Records</b> option marked, From <b>Group</b> field and <b>Load Query Output Fields</b> checkbox appear. | N/A: You select the export output on the Export screen, Output tab.                                                                                                                                                                                               |
| Date to use for gift date                          | Gift Parameters screen, General tab.<br><b>Start Date:</b><br><b>End Date:</b>                                                         | Gifts Criteria screen, <b>Date to Use</b> field. You can select Gift date, GL post date, Date Added, or Date changed.                                                                                                                                             |
| Soft credit distribution                           | Gift Parameters screen, General tab.<br><b>Soft Credit</b> frame: Credit to Donor, Recipient, Full amount to both, or split evenly     | Gifts Criteria screen, General tab.<br><b>Soft Credit Gifts To</b> frame:<br><b>Donor</b><br><b>Soft credit recipients:</b> Use distribution on gift; Split evenly; Full amount to all<br><b>Both:</b> Use distribution on gift; Split evenly; Full amount to all |
| Further defining gift criteria                     | Gift Parameters screen: Campaign tab, Funds tab, Appeals tab                                                                           | Gifts Criteria screen, Filters tab.<br>Filters include: Campaigns, Funds, Appeals, Query                                                                                                                                                                          |
| Gift Criteria, Gift Types tab                      | Checkboxes: <b>Use Pledge Balances</b> ; <b>Use Installment Balances</b> ; <b>Use Sale Amount for Sold Stocks</b>                      | Checkboxes: <b>Exclude zero amount gifts</b> ; <b>Use sale date for sold stock/property</b> ; <b>Use sale amount for sold stock/property</b> ; <b>Subtract broker fee from sold stock/property</b> ; <b>Use gift balance instead of gift amount</b>               |
| Information you can view before opening the export | Open Export screen: export name; <b>Type</b> ; <b>Date Last Run</b> ; <b>Date Created</b> ; <b>Created By</b> ; <b>Description</b>     | Export page, export columns available: <b>Name</b> ; <b>Description</b> ; <b>Export Type</b> ; <b>File Format</b> ; <b>Created</b> ; <b>Last Changed</b> ; <b>Last Run</b> ; <b>File Name</b> ; <b>Others May Change</b> ; <b>Others May Run</b>                  |
| Autosave on close                                  | N/A                                                                                                                                    | <b>Tools</b> , <b>User Options</b> , Export tab                                                                                                                                                                                                                   |
| Name                                               | N/A                                                                                                                                    | From the export record <b>Tools</b> menu, <b>Export Options</b> , <b>Export name</b> field.                                                                                                                                                                       |

| Field Name or Program Function              | RE 6.42 Location                                                                                                                  | RE 7 Location                                                                                                                                                                                                                                               |
|---------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| VBA macro                                   | N/A                                                                                                                               | From the export record <b>Tools</b> menu, <b>Export Options</b> , <b>VBA Macro</b> field. Available for applicable export formats.                                                                                                                          |
| Format                                      | Export Format screen. Available once you select to run the export.                                                                | From the export record <b>Tools</b> menu, <b>Export Options</b> , <b>Export format</b> field.                                                                                                                                                               |
| Type                                        | Open Export screen, <b>Export Information</b> frame, <b>Type</b> field. You determine the export type when you create the export. | From the export record <b>Tools</b> menu, <b>Export Options</b> , <b>Export type</b> field. You determine the export type when you create the export.                                                                                                       |
| Add to favorites                            | N/A                                                                                                                               | Export screen menu bar, <b>Favorites</b> , <b>Add to Favorites</b>                                                                                                                                                                                          |
| Export properties                           | N/A                                                                                                                               | Export screen menu bar, <b>File</b> , <b>Properties</b>                                                                                                                                                                                                     |
| View export field names                     | N/A                                                                                                                               | Export screen menu bar, <b>View</b> , <b>View Export Field Names</b> .                                                                                                                                                                                      |
| View header field names                     | N/A                                                                                                                               | Available only for flat database formats. If a relational database is selected for the export, <b>View Header Field Names</b> is disabled.                                                                                                                  |
| Expand, collapse export list                | N/A                                                                                                                               | Export page menu bar, <b>View</b> , <b>Expand Export List</b> ; <b>Collapse Export List</b>                                                                                                                                                                 |
| Exporting without opening the export record | N/A                                                                                                                               | On the Export page, highlight the export you want to use and click the <b>Export</b> link. For additional export options, right-click on the selected export, and choose either <b>Export Export List Grid</b> or <b>Export Export List Grid to Excel</b> . |
| Find an export                              | N/A                                                                                                                               | On the Export page, click <b>Find</b> .                                                                                                                                                                                                                     |
| Head of Household processing                | N/A                                                                                                                               | Export screen, General tab, <b>'Head of Household' Processing</b> frame.                                                                                                                                                                                    |
| Default format                              | N/A                                                                                                                               | <b>Tools</b> , <b>User Options</b> , Export tab, <b>Default export format</b> field.                                                                                                                                                                        |

| Field Name or Program Function | RE 6.42 Location | RE 7 Location                                                                                                                                                                          |
|--------------------------------|------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Yes/No fields format           | N/A              | <b>Tools, User Options</b> , Export tab,<br><b>When exporting yes/no fields</b><br><b>export</b> field                                                                                 |
| Include constituents           | N/A              | Export screen, General tab,<br><b>Include these Constituents</b> frame:<br><b>Inactive constituents; Deceased</b><br><b>constituents; Constituents with</b><br><b>no valid address</b> |

## Mail

| Field Name or Program Function                  | RE 6.42 Location                                                  | RE 7 Location                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-------------------------------------------------|-------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Open Mail Function list                         | Single list                                                       | Mail page links                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     |
| Gift Preferences                                | On the mail menu, <b>Edit, Preferences</b> , Gift Preferences tab | <b>Tools, User Options</b> , Mail tab, <b>Gift preferences</b>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |
| Label Layout                                    | N/A                                                               | Available for Forms and Labels, Cards, and Envelopes. Click the <b>Layout</b> button to view a sample of how the selected data will appear. Unlike the <b>Preview</b> button, which includes all records selected for the mailing, <b>Layout</b> shows you one sample record. You can easily determine if the information you want to include in the mailing is selected by clicking <b>Layout</b> after you make selections on each mail tab.                                                                                                                                                                                                      |
| Save mailing template                           | N/A                                                               | You can save the settings you select for each mailing as a parameter file. A parameter file is essentially a template you can use to run the exact mailing at a later date. Or, you can make changes to the parameter file settings to build a new mailing without having to select all the settings again. By using parameter files, you can save time because you do not need to recreate your mailings each time. To save mailing parameters, once you create the mail task, select <b>File, Save</b> on the menu bar. Enter a name for the mailing that explains the contents and a description of the parameters selected. Click <b>Save</b> . |
| Quick Letters for participants                  | N/A                                                               | Quick Letters screen, General tab, <b>Create for frame, Participants</b> .                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
| Adjust address placement on labels or envelopes | N/A                                                               | Can specify the number of blank lines to print before the first line and also the number of spaces before each line. This is done on the format tab - output options.                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |

| Field Name or Program Function                            | RE 6.42 Location                                                                                                                   | RE 7 Location                                                                                                                                                                                                                                                                                                                                                                 |
|-----------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Print return address                                      | N/A                                                                                                                                | For envelopes, you can select to print the return address for your organization. On the envelope parameter screen, select the Format tab. Select <b>Return Address</b> .                                                                                                                                                                                                      |
| Avery 566 series/ clear labels                            | N/A                                                                                                                                | Raiser's Edge 7 now supports this label type.                                                                                                                                                                                                                                                                                                                                 |
| Label information                                         | Print Labels or Cards screen, General tab, <b>Label Types</b> frame: <b>Description; Dimensions; # Across</b>                      | Label screen, General tab, <b>Form type</b> grid: <b>Type, Size, Across, Down, Description</b>                                                                                                                                                                                                                                                                                |
| Postal discount for flats                                 | N/A                                                                                                                                | For organization that use <i>PostalSaver</i> and subscribe to <i>AddressAccelerator</i> (address correction data service), the program now supports the address processing category "flats" for postal discounts.                                                                                                                                                             |
| Select to start printing at a specific row and column     | N/A                                                                                                                                | Label screen, General tab, <b>Start printing in Row</b> field and <b>Column</b> field.                                                                                                                                                                                                                                                                                        |
| Dates to determine gift information included in a mailing | General tab: <b>Start Date, End Date</b> (the program includes gifts with a gift date between the start and end date selected)     | General tab, <b>Include Gifts with these Dates</b> frame<br><b>Date to use:</b> Gift date, GL post date<br><b>Date:</b> you can select a specific date or date range                                                                                                                                                                                                          |
| Create Output Query                                       | For mailings that include the option to create an output query, the query type available is based on the mailing selected.         | In version 7, you can select to create an output query for each mailing. The query types available are based on the mailing selected. For mailings that include different types of records, you can select from more than one query type. For example, when printing receipts, you can choose from the following output queries: Constituent, Individual, Organization, Gift. |
| Addressee/Salutations format                              | Format tab, <b>Addressee</b> frame.<br>Additional addressee/salutations: Fields to Export tab, <b>Fields to be Exported</b> frame. | Fields to Include tab, <b>Available Fields</b> , double-click the <b>Addressee/Salutation</b> folder                                                                                                                                                                                                                                                                          |



| Field Name or Program Function                                                          | RE 6.42 Location                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | RE 7 Location                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
|-----------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Sort                                                                                    | <p>Format Tab, <b>Order</b> frame, (if available).</p> <p>Basing your mailing on a query limits the sort options available. For labels, cards, envelopes, label truncation reports and Quick Letters, you can sort by the query sort order or by ZIP code. For all other mailing types, the sort order selected in the query is used.</p> <p>If the mailing is not based on a query, the mailing type determines if sorting is available, and if available, the sort orders you can select.</p> | <p>Format tab, <b>Sort</b></p> <p>Sorting is available for all mailing types. You can select from two options: <b>Do not sort</b> and <b>Sort from the following fields</b>.</p> <p>Marking the sort option enables the sort selection fields. The fields you can sort in the mailing appear in the <b>Available Fields</b> box. The selections available are determined by the fields chosen on the Fields to Include tab. Move the fields you want to use to the <b>Sort Fields</b> box. In version 7, you can select as many sort fields as you like. Highlight each field and use the <b>Asc</b> and <b>Desc</b> buttons to determine the order for each.</p> <p>If the mailing is based on a query, you can also select Query from the <b>Available Fields</b> box to apply the query sort order to the mailing.</p> |
| Fields to include                                                                       | Certain mailing types have a Fields to Export tab on which you can select fields to include in the mailing. The available fields are determined by the mailing type.                                                                                                                                                                                                                                                                                                                            | In version 7, all mailings have a Fields to Include tab. The fields available depend on the mailing selected, but you have more field selections available in each list.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
| Acknowledge method for Donor Acknowledgement and Honor/Memorial Acknowledgement letters | Format tab, <b>Acknowledge Method</b> frame                                                                                                                                                                                                                                                                                                                                                                                                                                                     | Fields to Include tab, <b>Send one letter to each</b> field                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Campaigns, Funds, Appeals, Constituent Codes, Letters                                   | Separate tabs                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   | Filters tab                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Packages                                                                                | N/A                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | New filter type in version 7                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |
| Date Last Changed filter                                                                | N/A                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | Quick Letters, Filters tab                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                |

| Field Name or Program Function             | RE 6.42 Location                                                                                  | RE 7 Location                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|--------------------------------------------|---------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Attributes tab                             | <b>Include Attributes</b> frame; <b>Exclude Attributes</b> frame                                  | <b>Include or Exclude Records With these Attributes</b> checkbox and frame; <b>Add, Update or Delete these Attributes for each Record</b> checkbox and frame<br><br>If you select to include or exclude records by attribute, the record types available in the <b>Record Type</b> column depend on the mailing select. For example, you may be able to include or exclude constituent records and gift records for one mailing type, and constituent records only for another mailing. |
| Addresses                                  | Address tab; Contacts tab for organization contact information                                    | Ind. Address tab, Org. Address tab<br>You can select organization contact information on the Org. Address tab.                                                                                                                                                                                                                                                                                                                                                                          |
| Exclude zero amount gifts                  | N/A                                                                                               | Gift Types tab, <b>Exclude zero amount gifts</b> checkbox                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Recurring gift types                       | N/A                                                                                               | Gift Types tab, <b>Gift Types</b> box: <b>Recurring Gift Pay-Cash, Recurring Gift</b><br>New gift type in version 7.                                                                                                                                                                                                                                                                                                                                                                    |
| Include all default gifts types in mailing | N/A                                                                                               | Gift Types tab, <b>Load All Defaults</b> button.                                                                                                                                                                                                                                                                                                                                                                                                                                        |
| Determine how to calculate gift balance    | N/A                                                                                               | Gift Types tab, <b>Calculate gift balance based on date range, campaign, fund, and appeal</b> checkbox. Available only if the <b>Use gift balance instead of gift amount</b> checkbox is marked.                                                                                                                                                                                                                                                                                        |
| Omit punctuation                           | Format tab, <b>Omit Punctuation checkbox</b><br>Not available for letters.                        | Format tab, Output options, <b>Omit punctuation from</b> checkbox<br>Available for all mailing types.                                                                                                                                                                                                                                                                                                                                                                                   |
| Capital letters                            | Format tab, <b>Print in ALL CAPS</b> checkbox<br>Available only for labels, cards, and envelopes. | Format tab, <b>Print address in ALL Caps</b> checkbox<br>For letters: Format tab, <b>Export address in ALL Caps</b> checkbox<br>Available for all mailing types.                                                                                                                                                                                                                                                                                                                        |

| Field Name or Program Function | RE 6.42 Location                                                                                            | RE 7 Location                                                                                                                                                                                                                                                                    |
|--------------------------------|-------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Postal tab                     | Not available for letters.                                                                                  | Available for all mailing types.<br>For letters, if you use <i>Postal Discounts</i> and include the <b>Address barcode</b> and <b>Endorsement line</b> fields on the Fields to Include tab, you can use the Postal tab to sort the mailing to qualify for postal discounts.      |
| Amount Display options         | N/A                                                                                                         | Format tab, <b>Miscellaneous, Amount Display Options</b> frame<br>Available for forms and acknowledgement letters.                                                                                                                                                               |
| Label truncation reports       | Opening Mailing Function screen, Label Truncation Reports<br>Available only as a separate mailing function. | Labels, Cards, and Envelopes page, Label Truncation Report<br>For envelopes, labels, name tags, and place cards, you can select to create a report before generating the mailing: Format tab, Truncation reports, <b>Print Truncation Reports before run</b> checkbox and frame. |

## Query

| Field Name or Program Function         | RE 6.42 Location                                                                                                                                                                  | RE 7 Location                                                                                                                                                         |
|----------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Query type                             | <b>Edit, Properties</b> , Query Properties screen, <b>Properties</b> frame, <b>Type</b> field                                                                                     | <b>Tools, Query Options</b> , Query Options screen, General tab, <b>Query Type</b> field                                                                              |
| Query format                           | <b>Edit, Properties</b> , Query Properties screen, <b>Properties</b> frame, <b>Format</b> field                                                                                   | <b>Tools, Query Options</b> , Query Options screen, General tab, <b>Query Format</b> field                                                                            |
| Query description                      | <b>Edit, Properties</b> , Query Properties screen, <b>Description</b> field                                                                                                       | <b>Tools, Query Options</b> , Query Options screen, General tab, <b>Description</b> field                                                                             |
| Others may use/modify query            | <b>Edit, Properties</b> , Query Properties screen, <b>Other users may execute this query</b> checkbox and <b>Other users may modify this query</b> checkbox                       | <b>Tools, Query Options</b> , Query Options screen, General tab, <b>Other users may run this query</b> checkbox and <b>Other users may modify this query</b> checkbox |
| Select from query                      | <b>Edit, Properties</b> , Query Properties screen, <b>Select from Static Query</b> checkbox and field                                                                             | <b>Tools, Query Options</b> , Query Options screen, Record Processing tab, <b>Select from query</b> checkbox and field                                                |
| Apply output limits                    | <b>Edit, Properties</b> , Query Properties screen, <b>Apply Output Limits</b> checkbox and frame                                                                                  | <b>Tools, Query Options</b> , Query Options screen, Record Processing tab, <b>Apply output limits</b> checkbox and options                                            |
| Soft credits and matching gift credits | <b>Edit, Properties</b> , Query Properties screen, <b>Soft Credit</b> frame and <b>Matching Gifts</b> frame<br>Available only if a gift field is selected for the query criteria. | <b>Tools, Query Options</b> , Query Options screen, Gift Processing tab, <b>Credit Soft Credits to</b> frame and <b>Credit Matching Gifts to</b> frame                |
| Default type and format                | <b>Edit, Preferences, New Queries</b> frame, <b>Default Type</b> field and <b>Query Format</b> field                                                                              | <b>Tools, User Options</b> , Query tab, General, <b>Default query type</b> field and <b>Default query format</b> field                                                |
| Name format                            | <b>Edit, Preferences, Name Format</b> field                                                                                                                                       | <b>Tools, User Options</b> , Query tab, General, <b>Constituent name format</b> field                                                                                 |
| Number of records display              | <b>Edit, Preferences, Display Number of Records Found</b> checkbox                                                                                                                | <b>Tools, User Options</b> , Query tab, General, <b>Display number of records found on all queries</b> checkbox                                                       |
| Automatically run query when opened    | <b>Edit, Preferences, Run Query When Opened</b> checkbox                                                                                                                          | <b>Tools, User Options</b> , Query tab, General, <b>Automatically run queries when opened</b> checkbox                                                                |

| Field Name or Program Function                          | RE 6.42 Location                                                                                                                                                                | RE 7 Location                                                                                                                                                                                                                                                                                              |
|---------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Automatically include criteria selected in query output | <b>Edit, Preferences, Automatic Output for Criteria Fields</b> checkbox                                                                                                         | <b>Tools, User Options</b> , Query tab, Advanced, <b>Automatically add criteria fields as output fields</b> checkbox                                                                                                                                                                                       |
| Delete multiple queries                                 | <b>File, Delete</b>                                                                                                                                                             | From the Query page, <b>Tools, Delete Multiple Queries</b>                                                                                                                                                                                                                                                 |
| Only show my queries                                    | <b>File, Open, Only show my queries</b> checkbox                                                                                                                                | Query page, <b>Only show my queries</b> checkbox                                                                                                                                                                                                                                                           |
| Recently accessed queries                               | <b>File</b> menu                                                                                                                                                                | Query page, <b>Recently Accessed Queries</b> list                                                                                                                                                                                                                                                          |
| Viewable query information                              | <b>File, Open, Query Information</b> frame<br><br>The information in this frame corresponds to the query you highlight.                                                         | Query page columns<br><br>To add or remove columns, select <b>Columns</b> from the right-click menu and change the selections in the <b>Display these columns</b> box.<br><br>New columns available in version 7: <b>Last changed, Time, Include in, Output limits, Suppress duplicates</b>                |
| Available query types                                   | <ul style="list-style-type: none"> <li>• Individual</li> <li>• Organization</li> <li>• Constituent</li> <li>• Gift</li> <li>• Relationship</li> <li>• Special Events</li> </ul> | <ul style="list-style-type: none"> <li>• Individual</li> <li>• Organization</li> <li>• Constituent</li> <li>• Gift</li> <li>• Relationship</li> <li>• Event</li> <li>• Campaign</li> <li>• Fund</li> <li>• Appeal</li> <li>• Job</li> <li>• Participant</li> <li>• Membership</li> <li>• Action</li> </ul> |
| Query toolbar <b>Find Field</b> button                  | <b>Edit, Find</b> or binoculars toolbar button<br><br><b>Start of Field</b> option, <b>Any Part of Field</b> option                                                             | <b>Edit, Find</b> , binoculars toolbar button, and <b>Find</b> button on Criteria, Output, and Sort tabs<br><br><b>Match</b> field selections: Any Part of Field, Whole Field, Start of Field<br><br><b>Match case</b> checkbox                                                                            |
| Preview control report                                  | <b>File, Print Preview</b> or print preview toolbar button                                                                                                                      | <b>File, Print Preview, Control Report</b>                                                                                                                                                                                                                                                                 |

| Field Name or Program Function                                                   | RE 6.42 Location                                                | RE 7 Location                                                                                                                                                                                                         |
|----------------------------------------------------------------------------------|-----------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Print query results                                                              | <b>File, Print</b> or print toolbar button                      | <b>File, Print, Query List</b> or print toolbar button                                                                                                                                                                |
| Merge queries                                                                    | <b>File, Merge</b>                                              | Query page, <b>Tools, Merge Queries</b>                                                                                                                                                                               |
| Gift summary fields                                                              | <b>Available Fields</b> frame, <b>Gift, Summary Information</b> | Criteria tab, <b>Available Fields</b> frame, <b>Summary Information, Summary For Gift</b>                                                                                                                             |
| Entering criteria for summary information                                        | Edit Field Criteria screen fields                               | Edit Field Criteria screen, Criteria tab fields and Filter tab fields                                                                                                                                                 |
| Open a group                                                                     | From <i>Constituent Management</i> , <b>File, Group</b>         | On the query Results tab, double-click a record. Use the arrow buttons on the menu bar to move to the next record or the last record in the query group.                                                              |
| Refreshing static query                                                          | <b>File, Refresh Static Query</b>                               | <b>Records, Refresh</b>                                                                                                                                                                                               |
| Query name                                                                       | N/A                                                             | <b>Tools, Query Options</b> , General tab, <b>Query Name</b> field                                                                                                                                                    |
| Suppress duplicate rows                                                          | N/A                                                             | <b>Tools, Query Options</b> , Record Processing tab, <b>Suppress duplicate rows</b> checkbox                                                                                                                          |
| VBA Macro                                                                        | N/A                                                             | <b>Tools, Query Options</b> , Record Processing tab, <b>VBA Macro</b> field                                                                                                                                           |
| Alternate SQL method for code                                                    | N/A                                                             | <b>Tools, Query Options</b> , Advanced Processing tab, <b>Use alternate SQL method for code table fields</b> checkbox                                                                                                 |
| Alternate SQL method for multiple attributes                                     | N/A                                                             | <b>Tools, Query Options</b> , Advanced Processing tab, <b>Use alternate SQL method for multiple attributes</b> checkbox                                                                                               |
| Automatically save query criteria, sort order, and output selections when closed | N/A                                                             | <b>Tools, User Options</b> , Query tab, General, <b>Automatically save query parameters on close</b> checkbox                                                                                                         |
| Applying filter criteria to summary fields                                       | N/A                                                             | <b>Tools, User Options</b> , Query tab, Advanced: Automatically apply all query criteria option, <b>Do not automatically apply all query criteria</b> option, <b>Ask me each time I select a summary field</b> option |

| Field Name or Program Function                 | RE 6.42 Location | RE 7 Location                                                                                                                                                                                                                                                                       |
|------------------------------------------------|------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Include certain constituents                   | N/A              | <b>Tools, User Options</b> , Query tab, Advanced: <b>Include inactive constituents</b> option, <b>Include deceased constituents</b> option, <b>Include constituents with no valid addresses</b> option                                                                              |
| Display code tables by short/long description  | N/A              | <b>Tools, User Options</b> , Query tab, Advanced                                                                                                                                                                                                                                    |
| Code table sort order                          | N/A              | <b>Tools, User Options</b> , Query tab, Advanced                                                                                                                                                                                                                                    |
| Quick Find                                     | N/A              | Query page, <b>Quick Find</b> field                                                                                                                                                                                                                                                 |
| Favorites                                      | N/A              | On the Query page, highlight the query name. From the menu bar, select <b>Favorites, Add to Favorites</b> . On the Add User Favorite screen, enter the query description so you can easily identify it in the <b>Favorites</b> list, and click <b>OK</b> .                          |
| Open records from results tab                  | N/A              | Double-click a record. Use the arrow buttons on the menu bar to move to the next record or the last record in the query group.                                                                                                                                                      |
| Summary of action information for constituents | N/A              | For constituent, individual, or organization queries, the <b>Summary Information</b> fields in the <b>Available Fields</b> list includes the <b>Summary for Actions</b> field.                                                                                                      |
| Expand query list                              | N/A              | Query page, <b>Expand Query List</b> field                                                                                                                                                                                                                                          |
| Query properties                               | N/A              | <b>File, Properties</b> or <b>Properties</b> toolbar button. From the Properties screen General tab, you can view the query details. From the Selected Fields tab, you can view the criteria, sort, and output selections applied to the query.                                     |
| Ask operator                                   | N/A              | Query criteria operator. By selecting <ask> in the <b>Operator</b> field, you do not have to define a value for the field until you run the query. When you run a query containing an ask operator, a prompt appears for each <ask> field, and you must select a value to continue. |

## Reports

| Field Name or Program Function                             | RE 6.42 Location                                                                                                                                                                                                                                                                                                                                                                   | RE 7 Location                                                                                                                                                                                                                                                                                                                                                     |
|------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Determine report orientation for printing                  | N/A                                                                                                                                                                                                                                                                                                                                                                                | <b>Tools, User Options</b> , Reports tab, All Reports<br><br>You can base the print orientation or reports, portrait or landscape, on either the report settings or the printer settings.                                                                                                                                                                         |
| Financial Reports: Gift Detail Report, Gift Summary Report | Separate reports. You can also select to include a gift summary from the Gift Detail Report Format tab, by marking the <b>Include Gift Summary By</b> checkbox and choosing the record type on which to base the summary information.                                                                                                                                              | Reports page, <b>Financial Reports</b> link, Gift Detail and Summary Report. From the General tab, <b>Report Type</b> frame, you can mark <b>Detail, Summary</b> , or <b>Both</b> .                                                                                                                                                                               |
| Records to include in report                               | If more than one record type may be included: General tab, <b>From Group</b> field. You can select a query to base the report on from this field or leave the field blank to process all record types available for the query.<br><br>If only one record type applies: General tab, <b>Records to Include</b> frame, <b>All Records, Selected Records</b> , or <b>One Record</b> . | General tab, Include button, <b>All Records, Selected Records</b> , or <b>One Record</b> .                                                                                                                                                                                                                                                                        |
| Create an output query                                     | If available for the report selected: Format tab, <b>Create Output Query</b> checkbox.                                                                                                                                                                                                                                                                                             | General tab, <b>Create output query</b> checkbox and field, if available. The <b>Create output query</b> field is only available if you can base the output query on more than one record type.                                                                                                                                                                   |
| Base Pledge Reports on a gift query                        | N/A                                                                                                                                                                                                                                                                                                                                                                                | In version 7, you can select to include records from a gift query, in addition to constituent, individual, and organization queries.                                                                                                                                                                                                                              |
| Soft credit options                                        | If available for the report selected: General tab, <b>Soft Credit</b> frame.<br><br>You can mark the <b>Credited to Donor, Credited to Recipients</b> , or <b>Credited to Both</b> option. If you mark <b>Credited to Recipients</b> or <b>Credited to Both</b> the <b>Split Evenly</b> checkbox is enabled.                                                                       | If available for the report selected: General tab, <b>Soft Credit</b> frame.<br><br>You can mark the <b>Donor, Soft credit recipients</b> , or <b>Both</b> option. If you mark <b>Soft credit recipients</b> or <b>Both</b> , you can determine how you want to distribute credit. You can select: Use distribution on gift, Full amount to all, or Split evenly. |



| Field Name or Program Function                  | RE 6.42 Location                                                                                                                                 | RE 7 Location                                                                                                                                                                                                                                                                                                                                                                                                                                                                       |
|-------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Campaigns tab, Funds tab, Appeals tab           | You can make selections on each of these tabs to filter the information in campaign, fund, and appeal records you want to include in the report. | Filters tab                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
| Include certain constituents                    | N/A                                                                                                                                              | General tab, <b>Include these Constituents</b> frame: <b>Inactive constituents, Deceased constituents, Constituents with no valid addresses</b> checkboxes.                                                                                                                                                                                                                                                                                                                         |
| Exclude zero amount gifts                       | N/A                                                                                                                                              | Gift Types tab, <b>Exclude zero amount gifts</b> checkbox                                                                                                                                                                                                                                                                                                                                                                                                                           |
| Determine how to calculate gift balance         | N/A                                                                                                                                              | Gift Types tab, <b>Calculate gift balance based on date range, campaign, fund, and appeal</b> checkbox. Available if the <b>Use gift balance instead of gift amount</b> checkbox is marked. The following Pledge Reports are exceptions: Activity Report, Campaign Report, and Pledge Status Report. The <b>Calculate gift balance</b> checkbox is always available for these reports.                                                                                              |
| Include/Exclude based on Constituent Attributes | N/A                                                                                                                                              | New tab                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |
| Attributes tab                                  | <b>Include Attributes</b> frame; <b>Exclude Attributes</b> frame                                                                                 | <p>Include or Exclude Records With these Attributes checkbox and frame; Add, Update or Delete these Attributes for each Record checkbox and frame</p> <p>If you select to include or exclude records by attribute, the record types available in the <b>Record Type</b> column depend on the report you select. For example, you may be able to include or exclude constituent records and gift records for one mailing type, and constituent records only for another mailing.</p> |
| Address Processing                              | one tab                                                                                                                                          | separate tabs for Individual and Organization                                                                                                                                                                                                                                                                                                                                                                                                                                       |
| Name Formats                                    | define for donor only                                                                                                                            | define for donor and solicitor                                                                                                                                                                                                                                                                                                                                                                                                                                                      |

| Field Name or Program Function                 | RE 6.42 Location                                                                                                                                                        | RE 7 Location                                                                                                         |
|------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------|
| Print Report Criteria (Control report)         | N/A                                                                                                                                                                     | Format Tab/ can select what parts of the criteria to print/define to print on a separate page or first page of report |
| Sort/Break                                     | Date or Alpha if no query selected. Otherwise, query order.                                                                                                             | Sort can be defined based on fields selected in report. Break options are new to 7.0.                                 |
| Page and Report Footers                        | N/A                                                                                                                                                                     | new/Format Tab                                                                                                        |
| Amount Display Options                         | N/A                                                                                                                                                                     | Format Tab/Misc.                                                                                                      |
| Double Space report                            | N/A                                                                                                                                                                     | Format Tab/Misc.                                                                                                      |
| Optional Columns                               | as defined in Constituent record/Gift Tab                                                                                                                               | More field options available to select/Format Tab                                                                     |
| Apply Color Scheme                             | N/A                                                                                                                                                                     | new/Format Tab                                                                                                        |
| Enhancements to Cash Receipts Journal          | Print Credit Card Info; Include Reference field (optional)                                                                                                              |                                                                                                                       |
| Attributes Tab                                 | N/A                                                                                                                                                                     | new                                                                                                                   |
| Option for selected solicitor                  | N/A                                                                                                                                                                     | new                                                                                                                   |
| Filters                                        | Action type, status, solicitor, constituency                                                                                                                            | these plus action category, track, campaign, fund, users                                                              |
| Include these phone types (Tickler)            | Two may be defined                                                                                                                                                      | Any type may be included                                                                                              |
| Base report on option (Tickler)                | solicitor                                                                                                                                                               | user or solicitor                                                                                                     |
| Show action status                             | N/A                                                                                                                                                                     | new                                                                                                                   |
| Constituent Action History                     | Separate report                                                                                                                                                         | Was eliminated due to being identical to the Action Detail report                                                     |
| Action Reminder                                | Separate report                                                                                                                                                         | deferred                                                                                                              |
| Solicitor Comparison                           | N/A                                                                                                                                                                     | new                                                                                                                   |
| Solicitor Goal Summary                         | N/A                                                                                                                                                                     | new                                                                                                                   |
| CAE report                                     |                                                                                                                                                                         | deferred to future release                                                                                            |
| Enhancements to Solicitor Performance Analysis | Support of Soft Credit gifts; Print Solicitor Add\Sal; Show donors targeted for specific Campaign; Option for Totals only; use gift query; show only assigned campaign. |                                                                                                                       |

| Field Name or Program Function          | RE 6.42 Location                                                            | RE 7 Location                                                                                                                                                               |
|-----------------------------------------|-----------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Alumni Class Analysis                   | ran Totals or Individual from Format, but could not run in the same process | ability to print both at the same time                                                                                                                                      |
| Enhancements for Alumni Class List      | Only prints for Primary education record                                    | Print for multiple Class Of/ Education records; Not to print keyname if add\sai selected; option to print 2 addresses.                                                      |
| Enhancements to CFA Performance reports | Show totals at bottom; show C,F,A if no gifts given                         |                                                                                                                                                                             |
| Only show Active CFA                    | N/A                                                                         | new                                                                                                                                                                         |
| CFA Goal Summary reports                | N/A                                                                         | new                                                                                                                                                                         |
| CFA Comparison Summaries                | N/A                                                                         | new                                                                                                                                                                         |
| Sporting Event Roster                   | formerly Tournament Roster                                                  | name change                                                                                                                                                                 |
| Report on options                       | Event only                                                                  | Event or Group                                                                                                                                                              |
| Sort/Break                              | by registrant or Div/Team                                                   | These plus Position, Time Location, Gender, etc. Depends on report.                                                                                                         |
| Define optional columns                 |                                                                             | new on Sporting Event/ Format tab                                                                                                                                           |
| Dinner Preferences report               | N/A                                                                         | new                                                                                                                                                                         |
| Date to Use                             | based on membership                                                         | Membership date or Gift Date                                                                                                                                                |
| Create output query                     | not supported on some reports                                               | Cons, member, or gift query on all reports                                                                                                                                  |
| Filters                                 | limited to type of report run                                               | Expanded list of filters. Most include Cons solicitor, mem solicitor, Constituency, Programs, Categories, Subcategories. CFA filters only show if Date to Use is Gift Date. |
| Gift Types tab                          |                                                                             | Only shown if Date to Use is Gift Date.                                                                                                                                     |
| Attribute tab                           | N/A                                                                         | new                                                                                                                                                                         |

## Configuration

After the conversion completes, ensure that all your system wide settings are established. We recommend the supervisor fills out all the appropriate configuration information.

| RE 6.42 Field                            | RE 6.42 Location | RE 7 Field                                    | RE 7 Location                | Comments                                                         |
|------------------------------------------|------------------|-----------------------------------------------|------------------------------|------------------------------------------------------------------|
| Name                                     | General 1        | Name                                          | General                      |                                                                  |
| Address                                  | General 1        | Address                                       | General                      |                                                                  |
| City                                     | General 1        | Address                                       | General                      |                                                                  |
| State                                    | General 1        | Address                                       | General                      |                                                                  |
| Zip                                      | General 1        | Address                                       | General                      |                                                                  |
| Country                                  | General 1        | Address                                       | General                      |                                                                  |
| Phone                                    | General 1        | Phone                                         | General                      |                                                                  |
| Fiscal Year Ends                         | General 1        | Fiscal year ends                              | General                      |                                                                  |
| Volunteer Year Starts                    | General 1        | Volunteer year starts                         | General                      |                                                                  |
| Alumni School/College                    | General 1        | Alumni/School College or Alumni establishment | General                      | For more information, see the <i>Conversion Planning Guide</i> . |
| Federal Tax ID                           | General 1        | Federal Tax ID                                | General                      | US version                                                       |
| User Defined                             | General 1        | User defined                                  | General                      | US version                                                       |
| ID                                       | General 1        | ID                                            | General                      | US version                                                       |
| Automatically Generate Constituent IDs   | General 2        | Automatically Generate Constituent IDs        | Business Rules, Generate IDs |                                                                  |
| Automatically Generate Special Event IDs | General 2        | Automatically Generate Special Event IDs      | Business Rules, Generate IDs |                                                                  |
| Automatically Generate Membership IDs    | General 2        | Automatically Generate Membership IDs         | Business Rules, Generate IDs |                                                                  |
| N\A                                      | N\A              | Automatically Generate Gift IDs               | Business Rules, Generate IDs |                                                                  |
| N\A                                      | N\A              | Change ID generation                          | Business Rules, Generate IDs |                                                                  |

| RE 6.42 Field                                  | RE 6.42 Location | RE 7 Field                                              | RE 7 Location                                        | Comments |
|------------------------------------------------|------------------|---------------------------------------------------------|------------------------------------------------------|----------|
| N\A                                            | N\A              | Prefix IDs with current year                            | Business Rules, Generate IDs                         |          |
| N\A                                            | N\A              | Reset numbering at the start of a new year              | Business Rules, Generate IDs                         |          |
| N\A                                            | N\A              | Separate prefix from numbering using                    | Business Rules, Generate IDs                         |          |
| Automatically Soft Credit Spouse               | General 2        | Automatically soft credit this individual for gifts     | Constituent record, Spouse button, General 1         |          |
| Automatically Soft Credit Matching Gift Pledge | General 2        | Automatically apply soft credit to matching gift pledge | Business Rules, Gift options, Activity options       |          |
| Individual Duplicate Criteria – Field Name     | General 2        | Field Name                                              | Business Rules, Duplicates                           |          |
| Individual Duplicate Criteria – Length         | General 2        | Length                                                  | Business Rules, Duplicates                           |          |
| Organization Duplicate Criteria – Field Name   | General 2        | Field Name                                              | Business Rules, Duplicates                           |          |
| Organization Duplicate Criteria – Length       | General 2        | Length                                                  | Business Rules, Duplicates                           |          |
| N\A                                            | N\A              | Gift - Field Name                                       | Business Rules, Duplicates                           |          |
| N\A                                            | N\A              | Gift - Length                                           | Business Rules, Duplicates                           |          |
| Membership Card Name Default                   | General 2        | Default Membership Card Addressee/Salutation            | Business Rules, Name Display                         |          |
| N\A                                            | N\A              | Membership Given by Addressee/Salutation                | Business Rules, Name Display                         |          |
| N\A                                            | N\A              | Honor/Memorial Addressee/Salutation                     | Business Rules, Name Display                         |          |
| Duplicate Screen Addressee/Salutations         | Preferences      |                                                         | Search Screen. Options button. Miscellaneous buttons |          |
| Duplicate Screen Columns                       | Preferences      | Columns functionality                                   | Search Screen. Options button                        |          |

| RE 6.42 Field                              | RE 6.42 Location | RE 7 Field                                  | RE 7 Location                                           | Comments                                                         |
|--------------------------------------------|------------------|---------------------------------------------|---------------------------------------------------------|------------------------------------------------------------------|
| Heading Addressee/Salutation               | Preferences      | Heading – Addressee\Salutation – Individual | User Options, Records                                   |                                                                  |
| N\A                                        | N\A              | Heading – Organization                      | User Options, Records                                   |                                                                  |
| N\A                                        | N\A              | Heading – Relationship                      | User Options, Records                                   |                                                                  |
| N\A                                        | N\A              | Heading – Contacts                          | User Options, Records                                   |                                                                  |
| Interfaces – Word Processor Name           | Preferences      | N\A                                         | N\A                                                     | No equivalent in version 7.                                      |
| Interfaces – Word Processor Program Path   | Preferences      | N\A                                         | N\A                                                     | No equivalent in version 7.                                      |
| Interfaces – Word Processor Data File Path | Preferences      | User Options                                | User Options, File Location                             |                                                                  |
| Interfaces – Spreadsheet Name              | Preferences      | N\A                                         | N\A                                                     |                                                                  |
| Interfaces – Spreadsheet Program Path      | Preferences      | N\A                                         | N\A                                                     |                                                                  |
| Interfaces – Spreadsheet Data File Path    | Preferences      | User Options                                | User Options, File Location                             |                                                                  |
| Report Writer Database Path                | Preferences      | User Options                                | User Options, File Location                             |                                                                  |
| Graph Type                                 | Preferences      | N\A                                         | N\A                                                     |                                                                  |
| AccuMail Present                           | Preferences      | N\A                                         | N\A                                                     |                                                                  |
| AccuMail Path                              | Preferences      | User Options                                | User Options, File Location                             |                                                                  |
| Phone Format                               | Preferences      | Tables                                      | Edit Table Entry                                        |                                                                  |
| Class of Format                            | Preferences      | Class of format                             | Business Rules, Business Rules treeview, Alumni Options | For more information, see the <i>Conversion Planning Guide</i> . |
| Enter Key Moves to Next Field              | Preferences      | N/A                                         | N/A                                                     | This functionality is not available in version 7.                |

| RE 6.42 Field                        | RE 6.42 Location | RE 7 Field                                                                       | RE 7 Location                                  | Comments                    |
|--------------------------------------|------------------|----------------------------------------------------------------------------------|------------------------------------------------|-----------------------------|
| Confirm Single Match Results         | Preferences      | Confirm single match results                                                     | Search Screen, Options button                  |                             |
| Use Campaign, Fund and Appeal ID     | Preferences      | Appeal format                                                                    | User Options, Records                          |                             |
| Use Campaign, Fund and Appeal ID     | Preferences      | Fund format                                                                      | User Options, Records                          |                             |
| Use Campaign Fund and appeal ID      | Preferences      | Campaign format                                                                  | User Options, Records                          |                             |
| N\A                                  | N\A              | Event format                                                                     | User Options, Records                          |                             |
| N\A                                  | N\A              | Membership program format                                                        | User Options, Records                          |                             |
| N\A                                  | N\A              | Check these tabs for data                                                        | User Options, Records                          |                             |
| Automatically Complete Table Entries | Preferences      | Automatically complete table entries                                             | User Options, General                          |                             |
| N\A                                  | N\A              | Select the color to designate cells that are locked                              | User Options, Color                            | The default is yellow.      |
| N\A                                  | N\A              | General Ledger Search Options                                                    |                                                | This defaults to automatic. |
| Validate Credit Card Numbers         | N\A              | If credit card no. is invalid                                                    | Business Rules                                 |                             |
| N\A                                  | N\A              | For gifts linked to proposals, link matching gift pledge to the proposal as well | Business Rules                                 |                             |
| N\A                                  | N\A              | Exclude deceased individuals from Search, Reports Mailings, Query, Exports       | Business Rules                                 |                             |
| N\A                                  | N\A              | Default credit for matching gifts to                                             | Business Rules                                 |                             |
| Membership – Category Description    | Membership Cat   | Category                                                                         | Membership Categories, General Information tab |                             |

| RE 6.42 Field             | RE 6.42 Location | RE 7 Field                                                                       | RE 7 Location                                  | Comments                                                         |
|---------------------------|------------------|----------------------------------------------------------------------------------|------------------------------------------------|------------------------------------------------------------------|
| Membership – Dues Level   | Membership Cat   | Dues level                                                                       | Membership Categories, General Information tab |                                                                  |
| Membership – Minimum Dues | Membership Cat   | Minimum dues                                                                     | Membership Categories, General Information tab |                                                                  |
| Membership – Maximum Dues | Membership Cat   | Maximum dues                                                                     | Membership Categories, General Information tab |                                                                  |
| N\A                       | N\A              | Program                                                                          | Membership Categories, General Information tab |                                                                  |
| N\A                       | N\A              | Subcategory                                                                      | Membership Categories, General Information tab |                                                                  |
| N\A                       | N\A              | Lifetime membership                                                              | Membership Categories, General Information tab |                                                                  |
| N\A                       | N\A              | Maximum membership per membership record                                         | Membership Categories, General Information tab |                                                                  |
| N\A                       | N\A              | Membership category is inactive                                                  | Membership Categories, General Information tab |                                                                  |
| Membership – Default Fund | Mem Cat          | Gift defaults button; Configuration, Membership Categories, Default Settings tab |                                                | For more information, see the <i>Conversion Planning Guide</i> . |
| N\A                       | N\A              | Default Expires to                                                               | Membership Categories, Default Settings tab    | This defaults to “Same month/day as cycle start date”.           |



| RE 6.42 Field                        | RE 6.42 Location | RE 7 Field                                                                                                          | RE 7 Location                                  | Comments |
|--------------------------------------|------------------|---------------------------------------------------------------------------------------------------------------------|------------------------------------------------|----------|
| Membership –Expires After Units      | Membership Cat   | New membership expires after<br>And<br>Renewed memberships expire after<br>And<br>Rejoined memberships expire after | Membership Categories, Default Settings tab    |          |
| Membership – Expires After Frequency | Membership Cat   | New membership expires after<br>And<br>Renewed memberships expire after<br>And<br>Rejoined memberships expire after | Membership Categories, Default Settings tab    |          |
| Default Benefits                     | Membership Cat   | Benefit                                                                                                             | Membership Categories, Benefits tab            |          |
| N\A                                  | N\A              | Send benefits to                                                                                                    | Membership Categories, Benefits tab            |          |
| N\A                                  | N\A              | Default renewal card status to                                                                                      | Membership Categories, Default Settings tab    |          |
| Default Receipt Amount               | Membership Cat   | Default receipt amount                                                                                              | Membership Categories, Default Settings tab    |          |
| Other Amount                         | Membership Cat   | Other amount                                                                                                        | Membership Categories, Default Settings tab    |          |
| Renewal Information – Letters        | Membership Cat   | Letters                                                                                                             | Membership Categories, Renewal Information tab |          |

| RE 6.42 Field                          | RE 6.42 Location       | RE 7 Field                                                    | RE 7 Location                                  | Comments |
|----------------------------------------|------------------------|---------------------------------------------------------------|------------------------------------------------|----------|
| Renewal Information – Comment          | Membership Cat         | Comments                                                      | Membership Categories, Renewal Information tab |          |
| Renewal Information – #                | Membership Cat         | No.                                                           | Membership Categories, Renewal Information tab |          |
| Renewal Information – Renew            | Membership Cat         | Frequency                                                     | Membership Categories, Renewal Information tab |          |
| Renewal Information – Before/After     | Membership Cat         | Before/After                                                  | Membership Categories, Renewal Information tab |          |
| Drop After –Units                      | Membership Cat         | Drop this membership after being lapsed for                   | Membership Categories, Renewal Information tab |          |
| Drop After – Frequency                 | Membership Cat         | Drop this membership after being lapsed for                   | Membership Categories, Renewal Information tab |          |
| N\A                                    | N\A                    | Renewal notice information when there are gifts of membership | Membership Categories, Renewal Information tab |          |
| Financial Institution – Bank Name      | Financial Inst         | Bank name                                                     | Financial Institutions                         |          |
| Financial Institution – Branch Name    | Financial Inst         | Name                                                          | Financial Institutions                         |          |
| Financial Institution – Branch Address | Financial Inst         | Address                                                       | Financial Institutions                         |          |
| Financial Institution – Branch City    | Financial Inst         | Address                                                       | Financial Institutions                         |          |
| Financial Institution – Branch State   | Financial Inst         | Address                                                       | Financial Institutions                         |          |
| Financial Institution – Branch Zip     | Financial Institutions | Address                                                       | Financial Institutions                         |          |

| RE 6.42 Field                                    | RE 6.42 Location | RE 7 Field               | RE 7 Location                                                | Comments |
|--------------------------------------------------|------------------|--------------------------|--------------------------------------------------------------|----------|
| N\A                                              | N\A              | Phone Type               | Financial Institutions                                       |          |
| Financial Institution – Branch Phone             | Financial Inst   | Phone                    | Financial Institutions                                       |          |
| Financial Institution – Branch Country           | Financial Inst   | Address                  | Financial Institutions                                       |          |
| Financial Institution – Branch Region            | Financial Inst   | Address                  | Financial Institutions                                       |          |
| Sort code                                        | Financial Inst   | Sort code                | Financial Institutions                                       |          |
| BSB #                                            | Financial Inst   | BSB #                    | Financial Institutions                                       |          |
| State #                                          | Financial Inst   | State #                  | Financial Institutions                                       |          |
| Abbreviation                                     | Financial Inst   | Abbreviation             | Financial Institutions                                       |          |
| Institution ID                                   | Financial Inst   | Institution ID           | Financial Institutions                                       |          |
| Destination ID                                   | Financial Inst   | Destination ID           | Financial Institutions                                       |          |
| Financial Institution – Sponsoring Bank          | Financial Inst   | Sponsoring Bank checkbox | Configuration, Financial Institutions                        |          |
| Financial Institution – Account Name             | Financial Inst   | Account name             | Configuration, Financial Institutions, Sponsoring Bank frame |          |
| Financial Institution – Account #                | Financial Inst   | Account number           | Configuration, Financial Institutions, Sponsoring Bank frame |          |
| Financial Institution – User Number              | Financial Inst   | User number              | Configuration, Financial Institutions, Sponsoring Bank frame |          |
| Financial Institution – Branch Transit/Routing # | Financial Inst   | Transit Routing #        | Financial Institutions                                       |          |

| RE 6.42 Field                                   | RE 6.42 Location                    | RE 7 Field                                          | RE 7 Location              | Comments                                                                                       |
|-------------------------------------------------|-------------------------------------|-----------------------------------------------------|----------------------------|------------------------------------------------------------------------------------------------|
| Financial Institution – Branch Immediate Origin | Financial Inst                      | Immediate origin                                    | Financial Institutions     |                                                                                                |
| Financial Institution – Branch Other            | Financial Inst                      | Other                                               | Financial Institutions     |                                                                                                |
| Add/Sals                                        | Add/Sals tab                        | Add/Sal tab                                         | Addressees/<br>Salutations |                                                                                                |
| Tables                                          | Tables tab                          | Tables                                              | Tables                     | For more information, see “Export” on page 166.                                                |
| N\A                                             | N\A                                 | Interfund Entries tab                               | GL Distributions           |                                                                                                |
| N\A                                             | N\A                                 | Gift type                                           | GL Distributions           |                                                                                                |
| N\A                                             | N\A                                 | Associated type                                     | GL Distributions           |                                                                                                |
| N\A                                             | N\A                                 | Automatically match this gift                       | Gift Types tab             |                                                                                                |
| N\A                                             | N\A                                 | Automatically apply gift credits for this gift type | Gift Types tab             |                                                                                                |
| N\A                                             | N\A                                 | Gift type is inactive                               | Gift Types tab             |                                                                                                |
| N\A                                             | N\A                                 | Gift Summaries tab                                  |                            |                                                                                                |
| N\A                                             | N\A                                 | Account Distributions tab                           | GL Distributions           |                                                                                                |
| Blackbaud General Ledger System Present?        | General Ledger tab                  | N\A                                                 | General Ledger             | No equivalent in version 7. If this is marked in 6.4x, then the program assumes a path exists. |
| GL System Path                                  | General Ledger tab                  | Database path                                       | General Ledger             |                                                                                                |
| Check GL Numbers                                | General Ledger                      | Validate general ledger information                 | General Ledger             |                                                                                                |
| Source                                          | Database Administration, Post to GL | Raiser’s Edge source                                | General Ledger             | Defaults to <b><i>The Raiser’s Edge</i></b>                                                    |
| Journal Reference Fields Name                   | General Ledger tab                  | Reference field name                                | General Ledger             |                                                                                                |

| RE 6.42 Field                                    | RE 6.42 Location   | RE 7 Field                                                                             | RE 7 Location  | Comments |
|--------------------------------------------------|--------------------|----------------------------------------------------------------------------------------|----------------|----------|
| Journal Reference Fields Length                  | General Ledger tab | Length                                                                                 | General Ledger |          |
| Attributes Description                           | Attributes tab     | Description                                                                            | Attributes     |          |
| Attributes Data Type                             | Attributes tab     | Data type                                                                              | Attributes     |          |
| Attributes Table Name                            | Attributes tab     | Table name                                                                             | Attributes     |          |
| N\A                                              | N\A                | Allow only one per record                                                              | Attributes     |          |
| N\A                                              | N\A                | Required                                                                               | Attributes     |          |
| International – Name                             | International tab  | Name                                                                                   | International  |          |
| International – Abbreviation                     | International tab  | Abbreviation                                                                           | International  |          |
| International – Currency Type                    | International tab  | Type                                                                                   | International  |          |
| International – Annual Rate                      | International tab  | Annual rate                                                                            | International  |          |
| International –Symbol                            | International tab  | Symbol                                                                                 | International  |          |
| International – Placement                        | International tab  | Placement                                                                              | International  |          |
| International – Number Format, 1000 Separator    | International tab  | 1000 separator                                                                         | International  |          |
| International – Number Format, Decimal Separator | International tab  | Decimal separator                                                                      | International  |          |
| International – Number Format, Decimal Digits    | International tab  | Decimal digits                                                                         | International  |          |
| International – Number Format, Leading Zero      | International tab  | Leading zero                                                                           | International  |          |
| International – Address Format                   | International tab  | Format address for this county like                                                    | International  |          |
| N\A                                              | N\A                | By default, synchronize individual address fields with <address as it will be printed> | International  |          |
| N\A                                              | N\A                | Include country in <address as it will be printed> using                               | International  |          |

| RE 6.42 Field                  | RE 6.42 Location       | RE 7 Field           | RE 7 Location | Comments |
|--------------------------------|------------------------|----------------------|---------------|----------|
| Letters – Description          | Letters tab            | Description          | Letters       |          |
| Letters – File Name            | Letters tab            | File location        | Letters       |          |
| Letters – Fields in Document   | Letters tab            | Merge document field | Letters       |          |
| Letters – Raiser’s Edge Fields | Letters tab            | Raiser’s Edge fields | Letters       |          |
| Field Characteristics          | Constituent Management | Fields               | Fields        |          |

## Tables

The following is a list of all the tables in 6.4x that convert to an equivalent in version 7 and the new tables in version 7. Any attributes stored as tables also convert.

| Version 6.42         | Version 7             |
|----------------------|-----------------------|
| Action status        | Action Status         |
| Actions              | Actions               |
| Addr/Sal types       | Addr/Sal Types        |
| Address info sources | Address Info Sources  |
| Address types        | Address Types         |
| Affiliations         | Affiliations          |
| Agencies             | Agencies              |
| Assignments          | Assignments/Interests |
| Awards               | Awards                |
| Benefits             | Benefits              |
| Categories           | Categories            |
| Certifications       | Certifications        |
| Class of Degree      | Class of Degree       |
| Classifications      | Classifications       |
| Closing codes        | Closing Codes         |
| Constituencies       | Constituent Codes     |

| Version 6.42             | Version 7                  |
|--------------------------|----------------------------|
| Contact types            | Contact Types              |
| Counties                 | Counties                   |
| Credit cards             | Credit Cards               |
| Currency types           | Currency Types             |
| Degrees                  | Degrees                    |
| Departments              | Departments                |
| Divisions                | Divisions                  |
| Donor age analysis codes | Donor Age Analysis Codes   |
| Donor category 1         | Donor Categories - Table 1 |
| Donor category 2         | Donor Categories - Table 2 |
| Donor category 3         | Donor Categories - Table 3 |
| Ethnicity                | Ethnicities                |
| Expense types            | Expense Types              |
| Faculties                | Faculties                  |
| Financial data types     | Financial Data Types       |
| Fund categories          | Fund Categories            |
| Gift codes               | Gift Codes                 |
| Gift size analysis codes | Gift Size Analysis Codes   |
| Hon/Mem types            | Tribute Types              |
| Income                   | Income                     |
| Industries               | Industries                 |
| Information sources      | Information Sources        |
| Instruments              | Instruments                |
| Locations                | Locations                  |
| Lodgings                 | Lodgings                   |
| Mail types               | Mail Types                 |
| Marital Status           | Marital Status             |

| Version 6.42            | Version 7                |
|-------------------------|--------------------------|
| N\A                     | Membership Card Types    |
| N\A                     | Membership Categories    |
| N\A                     | Membership Programs      |
| N\A                     | Membership Subcategories |
| Notepad types           | Notepad Types            |
| Participant status      | Participant Status       |
| Participant types       | Participant Types        |
| Phone types             | Phone Types              |
| Professions             | Professions              |
| Proposal status         | Proposal Status          |
| Prospect Interests      | Prospect Interests       |
| Purposes                | Purposes                 |
| Ratings                 | Ratings                  |
| Reason dropped          | Reason Left?             |
| Regions                 | Regions                  |
| Relationships           | Relationships            |
| Religions               | Religions                |
| School types            | School Types             |
| Schools                 | Schools                  |
| Sources                 | Sources                  |
| Special events expenses | Event Expenses           |
| Special event groups    | Event Groups             |
| Special event types     | Event Types              |
| Special event units     | Event Units              |
| Special interests       | Special Interests        |
| Special mailing types   | Special Mailing Types    |
| Subject of Study        | Subject of Study         |



---

| Version 6.42            | Version 7               |
|-------------------------|-------------------------|
| Suffixes                | Suffixes                |
| Target                  | Target                  |
| Teams                   | Teams                   |
| Titles                  | Titles                  |
| Type of gift            | Type of Gift            |
| Volunteer courses       | Volunteer Courses       |
| Volunteer license types | Volunteer Licence Types |
| Volunteer positions     | Volunteer Positions     |
| Volunteer skill levels  | Volunteer Skill Levels  |
| Volunteer skills        | Volunteer Skills        |
| Volunteer status        | Volunteer Status        |
| Volunteer types         | Volunteer Types         |



# Index



## A

- actions
  - field mapping
    - actions information 123
    - attributes 124
    - information 123
  - post conversion 35
- address information
  - field mapping
    - additional addresses 69
    - address types 65
    - alternate addresses 69
    - business 69
    - contacts 69
    - individual addresses 61
    - individuals 61
    - organization 63
    - spouse 69
    - spouse business 69
- addressee/salutation, field mapping 100
- adjustments, field mapping 112
- affiliation information, field mapping 104
- alternate address information, field mapping 69
- alumni school/college default, post conversion 36
- appeals, field mapping 162
- attributes
  - education, converting 27
  - education, field mapping 86
  - gift, field mapping 123

## B

- bank information, field mapping 76
- bio 1 tab
  - individual 50
  - organization 58
- business
  - addresses 69
  - business information, field mapping 78

## C

- campaigns, field mapping 164
- configuration, field mapping 184
- constituency codes, field mapping 91
- constituents

- converting
  - deceased 20
  - inactive 20
  - no valid address 20
- duplicate criteria 42
- field mapping
  - appeal information 106
  - attribute information 125
  - bank information 76
  - notepad information 106
  - solicitor information 126
- contacts
  - addresses 69
  - field mapping 96
- credit card numbers, post-conversion 36
- Crystal report*
  - creating in version 7 19
  - installing 36
  - post-conversion 36

## D

- data processing 32
- details report 34

## E

- education
  - attributes, converting 27
  - attributes, field mapping 86
  - field column 27
  - information, field mapping 84
- employment information, field mapping 86
- Event Management*, field mapping 143
- events, field mapping 143
- events, post conversion 42
- Export*
  - creating in version 7 19
  - post conversion 44
- export, field mapping 166

## F

- field characteristics, post conversion 42
- field mapping
  - actions 123

address information 61  
 addressee/salutation 100  
 affiliation information 104  
 alternate address information 69  
 appeal information 106  
 appeals 162  
 bank information 76  
 business information 78  
 campaigns 164  
 configuration 166  
 constituency codes 91  
 constituent attributes 125  
 constituent biographical information  
     individual 50  
     organization 58  
 constituent solicitor information 126  
 contact information 96  
 education attributes 86  
 education information 84  
 employment information 86  
*Event Management* 143  
 export 166  
 funds 164  
 gift information  
     adjustments 112  
     general ledger distribution 112  
     gift attributes 123  
     gifts 106  
     honor/memorial 120  
     matching gifts 116  
     recurring gift information 121  
     reversals 112  
     split gifts 111  
     stocks 116  
     write-offs 115  
*Honor/Memorial Tracking* 128  
 mail 171  
 media information 124  
*Membership Management* 140  
 notepad information 106  
 phone information 76  
*Prospect Research Management* 136  
 query 176  
 relationship information 100  
 reports 180  
 tables 194  
*Volunteer Management* 129  
 funds, field mapping 164

## G

general ledger distribution, field mapping 112  
 gift  
     attributes, field mapping 123  
     information, field mapping 106  
 gift distributions  
     distributions of gifts 42

## H

head of household 24  
 honor/memorial gift, field mapping 120  
*Honor/Memorial Tracking*, field mapping 128

## I

individual, field mapping 50  
 installing *Crystal Reports* 36  
 international address fields, post conversion 42

## M

mail merge documents, post-conversion 43  
 mail, field mapping 171  
 mailing, post-conversion 43  
 matching gift information, field mapping 116  
 media information, field mapping 124  
 membership card name, post-conversion 43  
 membership gift defaults, post-conversion 44  
 membership information, field mapping 140  
*Membership Management*, field mapping 140

## N

notepad information, field mapping 106

## O

organization, field mapping 58

## P

phone information, field mapping 76  
 post-conversion assistant  
     actions changed display 35  
     actions processed display 35  
     addressee and salutation 26  
     completed actions 23  
     constituents changed display 35  
     data processing 32  
     defined 19  
     details report 34  
     education attributes 27  
     head of household 24  
     primary addressee 26  
     running 20  
     solicit codes 22  
     summary 33  
     volunteer module 28  
 post-conversion checklist 46  
 pre-conversion 4

primary addressee 26  
 primary salutation 26  
 printing  
   queries in version 7 19  
   reports in version 7 19  
 prospect research  
   field mapping 136  
*Prospect Research Management*, field mapping 136

## Q

query  
   creating in version 7 19  
   post conversion 44  
   printing in version 7 19  
 query, field mapping 176

## R

recurring gift information, field mapping 121  
 relationship education information, field mapping 100  
 relationship education information,  
   post-conversion 44  
 relationships changed display 35  
 reports  
   create control report 32  
   post conversion 44  
   post-conversion details 34  
   printing in version 7 19  
 reports, field mapping 180  
 reversals, field mapping 112  
 running post-conversion assistant 20

## S

sale of stocks, field mapping 116  
 school name table, post-conversion 45  
 security groups, post-conversion 45  
 soft credit spouses, post-conversion 45  
 solicit codes, converting 22  
 solicitors, field mapping 126  
 split gifts, field mapping 111  
 spouse  
   field mapping  
     addresses 69  
     business addresses 69  
 stocks, field mapping 116

## T

tables, post-conversion 45  
 tribute module, field mapping 128

## U

use this addressee/salutation type field 27  
 user defaults, post-conversion 46  
 user options, post-conversion 46

## V

version 7, field mapping 49  
*Volunteer Management*, field mapping 129  
 volunteer module  
   field mapping  
     jobs 136  
     volunteer information 129  
 volunteer module, post-conversion 28

## W

write-offs, field mapping 115

---