# The Raiser's Edge<sup>™</sup>

**Custom View Guide** 

#### 012512

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# What Is In This Guide?

In the *Custom View Guide*, you learn how to create a customized view of individual and organization constituent records in your database. This makes it possible to view records containing only the information you want to see. You can also learn about the following:

- "Custom View: Understanding Fields, Objects, and Settings" on page 11
- "Constituent Record" on page 34
- "Custom View Samples" on page 37
- "Setting Properties, Criteria, Grid Design, and Format for a Custom View" on page 53
- "Applying a Custom View" on page 73
- "Printing a Custom View" on page 80

### How Do I Use These Guides?

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

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

**User Guides.** 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. 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* 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.

# **Custom View Quick Start**

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Note: Custom View is shipped with The Raiser's Edge and is located in Configuration.

With *Custom View* for *The Raiser's Edge*, you can create a customized view of individual and organization constituent records in your database. This makes it possible to view records containing only the information you want to see. By creating these customized screens, you can select and view only what is important and functional for your organization. Every field available on a constituent record may not be useful to you. Using *Custom View*, you can easily select and organize only the fields you want to appear for a constituent record. By using this customized viewing functionality, you can view constituent records in a way that specifically caters to you. For example, you want to create a biographical view that includes basic biographical information for a constituent. You can create a view listing biographical data such as the name, address, ID, and phone number for a constituent. When you want to view only such information for a constituent, you can apply the basic biographical custom view.

**Warning**: The Fields screen for *Custom View* is a list of export fields available with the *Export* module. However, you cannot use existing exports in *Custom View*. For more information about *Export*, see the *Query* & *Export Guide*.

To determine what to include in your custom view, use the export field list that already exists in The Raiser's Edge. Using the export field list, you can "drag and drop" the fields you want to view onto the Custom View Designer screen. You can then reorganize and change properties for these fields. You can also use roll up links, text labels, links to existing custom views, and saved parts to develop the custom view that fits your needs. Saved parts are parts of a custom view such as a roll up link or a text label that make up the custom view. You can save these parts to use when creating other custom views. Some saved parts are shipped with The Raiser's Edge and are listed under Saved Parts on the Fields screen. Using saved parts as building blocks to create new custom views and edit existing ones helps you take advantage of useful objects that already exist. Saved parts can also help you create uniform, consistent custom views, because you are reusing the same saved parts for new custom views. You can also work with custom parts as building blocks to create new views. To use advanced custom parts with Custom View, you must use the optional module VBA for Advanced Customization. With the optional module VBA for Advanced Customization, you can tweak The Raiser's Edge to design customized screens that fit the purposes of your organization. The custom parts you create list under **Custom** Parts on the Fields screen. For more information about using custom parts, contact Customer Support or see the VBA/API help file. To view the help file, select Help, RE:VBA/API from the menu bar of The Raiser's Edge shell. *Custom View* is also shipped with sample custom views that you can apply to your constituent records as they are, or edit them to fit your organization's needs. To view custom view samples that are shipped with the program, select Tools, Install Samples from the menu bar of The Raiser's Edge shell. For more information about installing and viewing samples, see the Program Basics Guide.

When building custom views, you can also change the look and feel of the images and text included in a custom view. For example, on the Field Group Properties screen, you can change the font, color, size, and style of the text in your custom view. You can also specify a background color and indentation. On the criteria screens for a field group, you can further specify what types of information you want to view for a field group. For grids, you can reorganize and resize columns.

Once your customized screen is complete, you can then open an individual or organization constituent record and select a custom view to apply to the constituent record. When you apply a custom view to a constituent record, you are in Custom view mode and the constituent record appears in a Microsoft *Internet Explorer 6* window screen. The screen is view-only, so any changes you need to make to the constituent record must be done from the normal constituent record view, or Edit mode. It is important to understand that *Custom View* does not change the information stored in your database. This functionality simply allows you to view records in a different way; in a customized way that is beneficial to you and your working needs. You can easily switch back and forth from Custom view mode to Edit mode using the **Run Custom View** button on the constituent record toolbar. Edit mode is the normal viewing mode for a constituent record (without an applied custom view). For more information about constituent records, see the *Constituent Data Entry Guide*.

With *Custom View*, you can also print high-quality hard copies of your custom view screens. When you decide to print a custom view screen, the information for the custom view becomes print-friendly. You do not need to worry about how much information you include in a custom view, because when printing, the screen automatically reformats to make sure all the information appears in the print version.

The following sections explain the basic functionality, fields, and objects available with Custom View.

# **Quick Start**

You can use *Custom View* to create view-only screens that matter to you. To help you understand the basics of *Custom View* and where it is located in *The Raiser's Edge*, use the following quick start sections. The rest of the *Custom View Guide* outlines the fields and objects you can use to create a custom view. You will also find procedures on how to create a custom view from scratch, using a template, and using saved parts. We suggest reading these sections thoroughly so that you can use *Custom View* to its full potential.

To successfully build custom views, use the following steps as a general outline for getting started.

- Access Custom View by clicking Config on the Raiser's Edge bar.
- Decide what fields and objects you want to include in your custom view.
- Drag and drop the selected fields and objects from the Fields screen to the Custom View Designer screen.
- Establish criteria for your fields and objects, changes settings, and specify properties.
- Save your custom view.
- Open a constituent record and apply a custom view by clicking the **Run Custom View** button on the constituent record toolbar.

### Where is Custom View?

To access Custom View, on the Raiser's Edge bar, click **Config**. The Configuration page appears. Click **Custom Views** to access the Custom Views page. From the Custom Views page, you can create custom views, open existing custom views, and delete custom views.

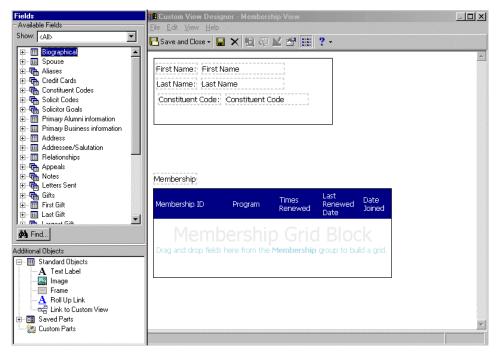


For more information about accessing Custom View, see "Navigating in Custom View" on page 8.

## Building a Custom View: The Basics

**Note**: To include a field label with a field, from the Fields screen press the **CTRL** key on your keyboard and highlight the field. Once you drag and drop the field onto the Custom View Designer screen, the field and its field label appear on the screen.

To build custom views, you can use the Fields screen and the Custom View Designer screen. The Fields screen contains a list of all available export fields that exist in **The Raiser's Edge**. The Fields screen also contains additional objects, such as roll up links and frames, that can be used in creating a custom view. To include a field or object in a custom view, use your mouse to select the field or object you want to include. Then, drag and drop the field or object to the Custom View Designer screen. Once you drag and drop your selected fields and objects, you can organize the fields and objects by selecting property, criteria, and grid design settings.



For more information about fields and objects, and choosing settings for them, see "Custom View: Understanding Fields, Objects, and Settings" on page 11.

## Applying a Custom View to a Record

**Note**: You do not have to close the Custom View Designer screen to apply a custom view to a constituent record. You can apply custom views to a constituent record while working in *Custom View*.

Once you create your custom view, you can apply it to any individual or organization record. When you apply a custom view, you are in Custom view mode. When you are viewing the constituent record without an applied custom view you are in Edit mode. To apply a custom view or switch back to Edit mode for a constituent record, from the constituent record, click the **Run Custom View** button on the toolbar.

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Middle name:	Gerome	

All custom views are view-only. You cannot add, edit, or delete any constituent record information directly from a custom view unless you are using custom parts with *VBA for Advanced Customization*. You must switch back to constituent record mode, or Edit mode, to add or change any information.

For more information about applying custom views, see "Constituent Record" on page 34.

# **Frequently Used Terms**

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

- Additional Objects box. The Additional Objects box contains a list of the additional options available for a custom view. In addition to the fields you can include on the Custom View Designer screen, you can also drag and drop a text label, image, frame, roll up link; and create a link to an existing custom view. From this box, you can also select saved parts and work with custom parts.
- Available Fields box. The Available Fields box contains a list of all export fields and their parent groups in *The Raiser's Edge*. You can use this export field list to create custom views. The one-to-one and one-to-many fields are listed as categories of information, which can be expanded to reveal all fields that fall under each category. You can drag and drop any of these fields onto the Custom View Designer screen to build your custom view. For more information about one-to-one and one-to-many fields, see "Available Fields" on page 14.
- **Building block.** A building block is a phrase used to describe a saved part of a custom view, such as a text label or frame, that you can use in building new custom views. For example, you create a custom view containing a text label as a header. You want to use the same text label as a header for other custom views. You can save the text label as a saved part and drag and drop that saved part when building new custom views. This method of creating custom views is referred to as the "building block" method.
- **Custom part.** To use custom parts, you must use the optional module VBA for Advanced Customization. With VBA for Advanced Customization, you can use custom parts to enhance the Custom View module further by tailoring the entire module to suit your working needs. Custom parts you create appear under **Custom Parts** in the **Additional Objects** box. For more information about custom parts, VBA for Advanced Customization, and how you can use them together, call Customer Support.
- **Custom view.** A custom view is a specific view you create for individual and organization constituent records. You can create unlimited custom views and use them to view constituent records in your database in a way that suits your working needs. You create custom views using export fields, roll up links, text labels, frames, images, saved parts, and custom parts while easily moving back and forth from Custom view and Edit mode for the constituent record.

- **Drag and drop.** Drag and drop is the method you use to bring over fields and objects to the Custom View Designer screen. For example, you can drag and drop one-to-one fields such as **Age** and **Birth date**, or one-to-many field groups such as **Gifts** and **Tributes**. You can also drag and drop text labels and frames. Once you select the desired fields and objects for your custom view, you can establish criteria and properties for those fields and objects, and view your constituent records using the new, customized view.
- **Edit mode.** Edit mode is the normal view of a constituent record. When you apply a custom view to the constituent record, you immediately leave Edit mode and enter Custom view mode. Your view varies, depending on the type of custom view you apply to the constituent record. You can add to and edit a constituent record only when in Edit mode. Custom view mode is view-only. For more information about constituent records, see the *Constituent Data Entry Guide*.
- Field label. A field label is the name of the field you drag and drop to the Custom View Designer screen. For example, you want to drag and drop the First name field to the Custom View Designer screen. In addition to the First name field, you want to be able to view the name of the field, or "field label", in your custom view. To bring over the field and the field label, click CTRL on your keyboard and drag and drop the First name field onto the Custom View Designer screen. The field and field label display.
- **Frame.** A frame can be used as a border for an object, such as an image or text label. You can drag and drop a frame to the Custom View Designer screen and then drag and drop an object inside of the frame. The frame serves as a border to the information you include inside the frame. For example, you drag and drop a frame to the Custom View Designer screen. You then drag and drop a text label inside the frame and double-click the text label to change the text. A frame now surrounds the text you included. Once you drag and drop a frame, you can establish border widths and other properties for your frames. You cannot, however, add text directly to a frame.
- **Group.** A group is a categorization of the two types of fields you can include in your custom view. In *The Raiser's Edge*, two types of criteria groups exist: one-to-one field groups and one-to-many field groups. One-to-one and one-to-many field groups illustrate the relationship between groups of fields. A one-to-one field group is composed of fields for which only one value exists in your database. For example, the **Nickname** field is a one-to-one field because only one value can be used for the **Nickname** field. A one-to-many field group is composed of fields for which several values exist in your database. Any gift field is an example of a one-to-many field group because several gifts can exist for one constituent.
- **Image.** An image is a graphic, such as a picture, that you can include in your custom view. For example, you want to include a small notepad graphic beside each roll up link in your custom view. This is your way of specifying that additional information exists within the roll up link. Images also provide a way of helping you apply creativity to your custom views. Not only are you customizing constituent record screens to suit your viewing needs, you may also choose to add special images that help you work with your constituent records.
- Link to custom view. A link to custom view is a link you can include in your custom view that is mapped to an existing custom view. You can click on the custom view link to access the custom view to which you mapped. For example, you created a Biographical custom view and a Gift custom view. You want to be able to easily toggle back and forth between the two views. You can open the Biographical view, add a link, and map to the Gift custom view. Each time you open the Biographical view for a constituent record, you can click on the Gift custom view link to immediately access the Gift custom view for the constituent.
- **One-to-many field group.** A one-to-many field group is composed of fields for which several values exist in your database. For example, the **Gifts** group is a one-to-many field group because each constituent record can be associated with more than one gift. **Notes** is another one-to-many field group because each constituent can have more than one notepad in the constituent record. You can recognize a one-to-many field group in two ways. One-to-many field groups display in *The Raiser's Edge* as an icon depicting one table related to other tables in the **Available Fields** box. You can also recognize one-to-many field groups because when you select to include a one-to-many field, a screen appears asking you to select a grid or free form layout for the field.

- One-to-one field group. A one-to-one field group is composed of fields for which only one value exists in your database. For example, the Spouse group is a one-to-one field group because only one relationship in a constituent's record is considered a spouse. Preferred Address is another one-to-one field group because each constituent can have only one preferred address in his record. You can recognize a one-to-one field group in two ways. One-to-one field groups display in *The Raiser's Edge* as a single table icon in the Available Fields box on the Fields screen. You can also recognize one-to-one field groups because you can drag and drop the fields under a specific field group without specifying to view the field in a grid or free form layout as you do with one-to-many fields. For example, unlike one-to-many fields, you can drag and drop the field group without being asked to specify grid or free form layout for the field.
- **Roll up link.** A roll up link is a link you can add to your custom view that can expand to include additional fields, images, frames, or additional information you want to include. Once you finish adding additional information, you can collapse the link so it appears as a link only. Collapsing the roll up link saves space on your custom view, and is easily accessible to expand whenever you need to view the additional information. To collapse a roll up link, click anywhere outside of the roll up link or click on the link itself.
- Saved part. A saved part is an object you can save to use in new or existing custom views. Once you save a part, it appears under Saved Parts in the Additional Objects box of the Fields screen for any custom view. You can use one-to-many field groups, text labels, images, frames, roll up links, and links to custom views as saved parts. Any saved parts that ship with *Custom View* appear under the Saved Parts. To save a part, simply right-click on the object and select Save part, or select Edit, Save part from the menu bar on the Custom View Designer screen.
- **Text label.** A text label is an object you can drag and drop on the Custom View Designer screen and can be used to add text to the screen of a custom view. For example, if you want to include educational information for a constituent, you can create a text label that reads "Education". You can then drag and drop the specific education fields onto the Custom View Designer screen and position the fields to appear under the text label. To change the text for a text label, simply double-click the text label. Text labels, as well as all other available objects, are flexible and can be used in a variety of ways.

# Security

Security options ensure the consistency and confidentiality of your data by limiting access to records and functions to only approved users. For example, by limiting access to constituent record fields, as well as other functionality in *The Raiser's Edge*, you can control who can process, change, or delete information for your organization.

*Custom View* respects all security defined in *The Raiser's Edge*. For example, when a user has specific legend colors defined on the Legends screen for gifts, *Custom View* respects those definitions. Because of this, gifts appear in any custom view as specified on the Legends screen. It is also important to note that when in Edit mode (constituent record mode), a user can only view what his security parameters allow. For example, when you are building custom views, you have access to all export fields. However, when you open a constituent record and view the constituent record in either Custom view or Edit mode, security respects the settings in *The Raiser's Edge* as defined for you and other users in your organization. Even though you are able to view all fields when building custom views, when you switch to Edit mode, you may be prohibited from viewing the actual information entered in those fields. For more information about establishing security options in *The Raiser's Edge*, see the *Configuration & Security Guide*.

# Navigating in Custom View

From the **Custom Views** link of *Configuration*, you can create a new custom view or open existing custom views for editing. To access the Custom Views page, on the Raiser's Edge bar, click **Config**. The Configuration page appears. Click **Custom Views**. The Custom Views page appears. From the Custom Views page, you can create and edit custom views to suit your specific working needs.



From the Custom Views page, you can use the **Create a new Custom View** link to create a customized view of the constituent records screens in your database. In addition, existing custom views appear as links on the page. To delete a custom view, click the **Delete this custom view** link under each existing custom view on the screen.

## Accessing a Custom View

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

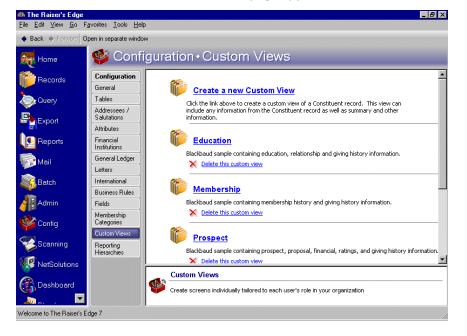
From the Custom Views page, you can create a new or open an existing custom view. To open and work with custom views, you must have appropriate security rights. For more information about security, see the *Configuration & Security Guide*.

#### Opening an existing custom view

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



2. Click **Custom Views**. The Custom Views page appears.



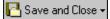
- \_ 🗆 🗙 Fields - Available Fields Show: <All> • 🔁 Save and Close - 🔛 🗙 🛅 🐖 🔟 🚰 🏢 ? -• + 🛄 Spouse Breining Spouse Prefix Alases Breining Credit Cards Breining Constituent Codes Breining Solicit Codes Breining Primary Alumni information Primary Alumni information First Name: First Name Last Name: Last Name Constituent Code: Constituent Code Primary Business information 🗄 📶 Address Addressee/Salutation
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   General Appeals Membership wed Date Times Renev 4embership ID Program -🙀 Find... Additional Objects A Text Label - 🔢 Saved Parts 🧑 Custom Parts
- 3. Click the link of the custom view you want to open. The custom view appears.

4. Make any necessary changes to the custom view and click **Save and Close** on the toolbar. You return to the Custom Views page.

## **Custom View Designer Toolbar**

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

The toolbar contains buttons representing common commands for a custom view. You can use these buttons as alternatives to menu commands to save time when creating and working with custom views.



Save and close the custom view (Save as can be accessed from the down arrow beside Save and Close.)

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Save the custom view



Delete the custom view

5

Change the criteria applied to a group



Format a field

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Enter grid design mode to resize and reorder columns in a group

### **P**

Change display properties for a field group or object

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Display the Field screen



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

# **User Options**

User options are preferences you set that affect how **The Raiser's Edge** looks and runs on the workstation you are using. User options are login-specific, which means if you log into any workstation using your password, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user.

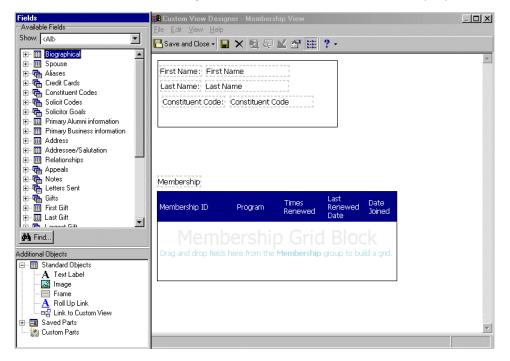
*Custom View* respects all security and user options defined in *The Raiser's Edge*. For more information about User Options, see the User Options chapter of the *Program Basics Guide*.

# Custom View: Understanding Fields, Objects, and Settings

*Custom View* for *The Raiser's Edge* is a very useful tool to view information stored on an individual or organization constituent record in a way that suits your working needs. With *Custom View*, you can view the constituent record information in a useful, creative way that helps you work faster and more efficiently. The key to *Custom View* is that you are in control of creating your own view of a constituent record. Perhaps you and your colleagues have different tasks, requiring you to use information in *The Raiser's Edge* in very specific ways. You may need a customized view of a constituent record, while your colleague may need to view all available information. With *Custom View*, you can build your own view, including the fields and objects you want.

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*Custom View* is a feature that differs a little from other modules available with *The Raiser's Edge*. You can think of *Custom View* as a virtual shell of information that you can manipulate to get a desired view. Any view you create is view-only, allowing you to change only the look of a constituent record, not the data stored on a constituent record. To create custom views, you work mainly with the Fields screen and the Custom View Designer screen. To create a custom view, you must first select the types of fields and objects you want to view for a constituent. The Fields screen lists all export fields in *The Raiser's Edge*. For more information about export fields, see the *Query & Export Guide*. Once you decide what fields and objects you want, you can drag and drop them to the Custom View Designer screen, and establish criteria and properties for your selections.



**Warning**: The Fields screen for *Custom View* is a list of export fields available with the *Export* module. However, you cannot use existing exports in *Custom View*. For more information about *Export*, see the *Query* & *Export Guide*.

You can then view your custom view by opening a constituent record and clicking the **Run Custom View** button on the constituent record toolbar. Once you click the button, all custom views that you created appear as menu options. You can then apply the custom view of your choice. The title of the custom view you apply appears in the title bar of the constituent record. You can easily switch back and forth between Edit mode, or normal constituent record view, and your own personalized, custom view. While you can build any type of view you want, it is impossible to disturb any of the information that currently exists on a constituent record. Remember, *Custom View* helps you build view-only screens. You never have to worry about tampering with constituent record data that already exists. Along those same lines, because custom view screens are view-only, you cannot add or edit the information on a constituent record through a custom view. To add or edit any information on a constituent record, you must make additions and changes directly from Edit mode.

To successfully use Custom View, use the following steps as a general outline for getting started.

**Note**: You do not have to close the Custom View Designer screen to apply a custom view to a constituent record. You can apply custom views to a constituent record while working in *Custom View*.

- Access Custom View by clicking Config on the Raiser's Edge bar.
- Decide what fields and objects you want to include in your custom view.
- Drag and drop the selected fields and objects from the Fields screen to the Custom View Designer screen.
- Establish criteria for your fields and objects, changes settings, and specify properties.

- Save your custom view.
- Open a constituent record and apply a custom view by clicking the **Run Custom View** button on the constituent record toolbar.

## **Fields Screen**

**Warning**: The Fields screen for *Custom View* is a list of export fields available with the *Export* module. However, you cannot use existing exports in *Custom View*. For more information about the *Export* module, see the *Query & Export Guide*.

To successfully create functional custom views, you can select from a list of fields to include on the Custom View Designer screen. The available fields are all export fields that exist in *The Raiser's Edge*. When you select to create a new custom view, the Custom View Designer screen and the Fields screen appear. The Fields screen includes a list of one-to-one and one-to-many field groups that you can drag and drop onto the Custom View Designer screen. For more information about these field groups, see "Available Fields" on page 14.

Fields	
Available Fields	
Show: <all></all>	
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Additional Objects	
Em 🛄 Standard Objects	
A Roll Up Link	
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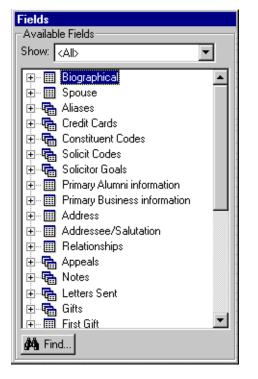
Drag and drop is the method used to bring over fields from the Fields screen to the Custom View Designer screen. Simply select the field you want to include, drag the field over to the Custom View Designer screen, and drop the field onto the screen. Once you drag and drop your selected fields, you can organize the fields the way you want them to appear in the view. For example, on the Fields screen, select the **Last Name** field and drag and drop it onto the Custom View Designer screen. Once you drop the field, you can then move the field around and specify properties, such as font and background, for the field. For more information about the available fields to use, see "Available Fields" on page 14.

#### 14 CHAPTER

In addition to the list of export fields you can use to create your custom views, you can also use objects such as roll up links, text labels, saved parts, and frames to develop customized views suited to your specific working needs. For example, with a roll up link, you can store additional, useful information related to the constituent record. A roll up link is designed to expand and collapse so you can view the additional information when you want and collapse the roll up link when you finish viewing. Images are useful when you need to store specific graphic files on a constituent record. These objects are designed specifically to help you create customized views. For a detailed description of the available objects you can use, see "Additional Objects" on page 16.

#### **Available Fields**

Using the **Available Fields** box on the Fields screen, you can select and define any export field to use for your custom views. When selecting the types of fields you want to include, in the **Show** field, you can select to show all available fields, or you can select to show a specific criteria groups of fields. Examples of criteria field groups you can view include **Biographical**, **Tributes**, and **Summary information**.



A Criteria field group is a group of related fields from the same record type. For example, the **Biographical** group contains all the fields on the main constituent record and a **Gift** group contains all the fields contained in a gift record. In *The Raiser's Edge*, two types of criteria field groups exist: one-to-one field groups and one-to-many field groups. One-to-one and one-to-many field groups illustrate the relationship between groups of fields. Below is a description of these groups and how they can be used in creating your custom views. For more detailed information about criteria field groups for export fields, see the *Query & Export Guide*.

#### **One-to-One Field Groups**

A one-to-one field group is composed of fields for which only one value exists in your database. For example, the **Spouse** group is a one-to-one field group because only one relation in a constituent's record is considered a spouse. **Preferred Address** is another one-to-one field group because each constituent can have only one preferred address in their record. You can recognize a one-to-one field group in two ways. One-to-one field groups display in *The Raiser's Edge* as a single table icon in the **Available Fields** box on the Fields screen. You can also recognize one-to-one field groups because you can drag and drop the fields under a specific field group without being asked to specify grid or free form layout for the field. For example, unlike one-to-many fields, you can drag and drop the **Age** field under the **Biographical** group without being asked to specify grid or free form layout.

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#### **One-to-Many Field Groups**

A one-to-many field group is composed of fields for which several values exist in your database. For example, the **Gifts** group is a one-to-many field group because each constituent record can be associated with more than one gift. **Notes** is another one-to-many field group because each constituent can have more than one notepad in the constituent record. You can recognize a one-to-many field group in two ways. One-to-many field groups display in *The Raiser's Edge* as an icon depicting one table related to other tables in the **Available Fields** box.

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You can also recognize one-to-many field groups because when you select to include a one-to-many field, a screen appears asking you to select a grid or free form layout for the field. For example, to include gift information for a constituent, you must first drag and drop the **Gifts** group or any field under the **Gifts** group. A screen then appears asking you to select to view the group as a grid layout or free form layout. Once you decide how you want to view the gifts, you can begin dragging and dropping additional fields that exist under the **Gifts** group, and specifying the criteria for the fields. It is important to remember that you can include only fields for a one-to-many field group that exist under that group. For example, you cannot include an action-specific field under the **Gifts** group.

In addition, when viewing custom views that contain one-to-many field groups, at times, you can click information included in a custom view. For example, when you create a **Gifts** grid for a custom view, listing the **Campaign**, **Fund**, and **Appeal** fields, when you select to apply the custom view, any campaign, fund, or appeal record shown on the custom view becomes a link. You can then click the link to view the campaign, fund, or appeal record.

When you work with primary one-to-many fields that contain secondary one-to-many fields within that group, you must first include the primary field group as free-form layout before you can include the secondary field group. For example, if you want to include the **Campaigns** one-to-many group, you must first include the **Gifts** one-to-many group as free form layout. Then, you can select the **Campaigns** field group as either free form or grid layout. In this case, the field groups rely on settings from each other. In this example, you cannot include the **Campaigns** field group until you include the **Gifts** field group. For more information about setting up one-to-many field groups on the Custom View Designer screen, see "Select Group Style Screen" on page 29.

### **Additional Objects**

In addition to the **Available Fields** box on the Fields screen, the **Additional Objects** box is also useful in creating a custom view. In the **Additional Objects** box, several options exist to help make your custom view easier to view; more specific; and most importantly, designed to fit your working needs. To view additional objects, click the plus sign to the left of the group name to reveal available options. For example, click the plus sign next to **Standard Objects** to reveal the available standard objects. Available options include Text Label, Image, Frame, Roll Up Link, and Link to Custom View.

You can also click the plus sign next to **Saved Parts** to reveal available saved parts you can use. **Saved Parts** lists any saved parts you create, as well as saved parts from the sample custom views shipped with *Custom View*. Custom parts you create list under **Custom Parts**. To use custom parts, you must use the optional module *VBA for Advanced Customization*. For more information about using custom parts, contact Customer Support or see the *VBA/API* help file. To view the help file, select **Help**, **RE:VBA/API** from the menu bar of **The Raiser's Edge** shell.



#### Text Label

A text label is an object you can drag and drop on the Custom View Designer screen and use to add text to the screen of a custom view. You can use text labels as header information in your custom view, as well as to help organize your custom view into chunks of information. For example, you can include a text label called "Bio Information". Under "Bio Information", you can list various biographical fields such as **First name**, **Last name**, and **Age**. The "Bio Information" text label designates where the biographical information for a constituent is located in your custom view. To add or edit text in a text label, simply double-click the text label.



#### Image

An image is a graphic, such as a picture, that you can include in your custom view. For example, you want to include a small graphic of a book beside each roll up link in your custom view. This is your way of specifying that additional education information exists within the roll up link. Images also provide a way of helping you apply creativity to your custom views. Not only are you customizing constituent record screens to suit your viewing needs, you may also choose to add special images that help you with your constituent records.

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First Name Last Name School name Degree Class of
Rollup Link

#### Frame

A frame can be used as a border for an object, such as an image or text label. You can drag and drop a frame to the Custom View Designer screen, and then drag and drop an object inside of the frame. The frame serves as a border for the information you include inside of the frame. For example, you drag and drop a frame to the Custom View Designer screen. You then want to include text inside the frame. You can drag and drop a text label, and then double-click the text label to change the text. You can then establish properties for the frame, such as border width and color. You can also save the frame block with the fields you selected to include inside the frame as a saved part. For more information about establishing properties, see "Setting Properties, Criteria, Grid Design, and Format for a Custom View" on page 53.

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Rollup Link	

#### **Roll Up Link**

A roll up link is a link you can add to your custom view that can expand to include additional fields, images, frames, or any additional information you want to include. Once you finish adding additional information, you can collapse the link so it appears as a link only. The idea of a roll up link is to save space on your screen. With a roll up link, you always have extra room to add additional information as needed. Collapsing the roll up link saves space on your custom view, and is easily accessible to expand whenever you need to view the additional information.

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#### Link to Custom View

A link to custom view is a link you can include in your custom view that is mapped to an existing custom view. You can click on the custom view link to access the custom view to which you mapped. For example, you created a Gift custom view and a Membership custom view. You want to easily toggle back and forth between the two views. You can open the Gift view, add a link, and map to the Membership custom view. Each time you open the Gift view for a constituent record, you can click on the Membership custom view link to immediately access the Membership custom view for the constituent. To add or edit text for a link to custom view, simply double-click the link.

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#### **Saved Parts**

A saved part is an object you can save to use in new or existing custom views. Once you save a part, it appears under **Saved Parts** in the **Additional Objects** box of the Fields screen. You can use one-to-many field groups, text labels, images, frames, roll up links, and links to custom views as saved parts. Any saved parts that ship with *Custom View* templates also appear under the **Saved Parts** group. To save a part, right-click on the object and select **Save part**, or select **Edit**, **Save part** from the menu bar on the Custom View Designer screen.

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#### **Custom Parts**

To use custom parts, you must use the optional module *VBA for Advanced Customization*. You can use custom parts to enhance the *Custom View* module further by tailoring the entire module to suit your working needs. With the optional module *VBA for Advanced Customization*, you can tweak *The Raiser's Edge* to design customized screens that fit the purposes of your organization. You can also use custom parts to create links to external applications and make editable fields. Once you create custom parts, they appear under *Custom Parts* in the *Additional Objects* box of the Fields screen. For more information about custom parts, *VBA for Advanced Customization*, and how you can use them together, contact Customer Support or see the *VBA/API* help file. To view the help file, select Help, RE:VBA/API from the menu bar of *The Raiser's Edge* shell.



## **Custom View Designer Screen**

**Note**: You can hover your mouse over one-to-one field groups to view the field group path to which a field group belongs. For example, when you hover over the **First Name** field, you can see that the path for **First Name** is Constituent/ Biographical/ First Name. You can also view paths for one-to-many field groups in free form layout. Paths can also be viewed in the status bar of a custom view.

When working with custom views, the Custom View Designer screen is the platform you use to create and change all custom view designs. You can think of the Custom View Designer screen as a palette for your work. Once you select the fields you want to appear for a custom view, you can use the Custom View Designer screen to reorganize the fields, specify properties for those fields, and include objects, such as roll up links and text labels.

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Org Name: Org N	ame Org ID : Org ID Parent Corp: Parent Corp	
Constituent Cod	e: Constituent Code No. subsidiaries: No.	
No. employees:		
Address line 1:	employees Organization Matches Gifts?: Organization Address line 1 Matches Gifts?	
Address line 2:	Address line 2	
City: City	State: State ZIP: ZIP	
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Once you drag and drop the fields you want to appear for the view, you can move the fields around on the screen by clicking the field. The field is highlighted and you can then move the entire field anywhere on the screen. To include a field label with a field, press the **CTRL** key on your keyboard and click both the field label and the field itself. You can now drag and drop both the field and the field label together onto the Custom View Designer screen. When you select not to include the field label with a field, and you apply a custom view to a constituent record, you view only the values for the fields you selected for the custom view.

You may find that once you begin using *Custom View*, including the field labels on a custom view can be quite beneficial. Including field labels is also useful when you want to make sure the two items stay equally aligned in your custom view. You can also move multiple fields at the same time on the Custom View Designer screen. To move multiple fields at once, highlight a field, and click **CTRL** on your keyboard. Then, highlight the additional fields you want to move. It is important to spend time thinking about how you want to design your custom views. Carefully planning the layout is a key element in using *Custom View* to its full potential.

When you finish including the fields you want on the Custom View Designer screen, you can establish properties, set criteria, edit grid blocks, and specify formatting options for your fields. With one-to-many field groups, you can work with properties and criteria. When you include a one-to-many field group in grid layout, you can also edit the grid block. When you are working with one-to-one field groups, you can only establish properties for those fields. You can specify formatting options for fields such as date fields and addressee fields. For example, when working with date fields, you can specify the date to appear in long or short date format.

When establishing properties, setting criteria, editing grid blocks, and specifying formats, you must highlight the item with which you are working. Once you click or highlight the item, a blue, dotted line appears around the item. The **Criteria**, **Edit**, **Properties**, and **Format** buttons also appear on the bottom right corner of the item with which you are working. The following sections describe options you can use to help make your custom views more specific for your viewing needs.

#### **Field Group Properties Screen**

**Note**: You can also specify properties for a field or field group by selecting **Edit**, **Properties** from the menu bar, or by clicking the **Properties** button on the toolbar.

You can establish property settings for both one-to-one and one-to-many field groups. For example, when setting properties, you can change the color and look of the font for a field, change the background color of a grid, establish border size, and specify indentation for a field. To apply properties to a field group, click the field group block so the block is highlighted. Once the block is highlighted, click the **Properties** button located on the bottom right corner of the field group block.

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Bio
First Name: First Name Last Name: Last Name
ID: ID
Address line 1: Address line 1
Address line 2: Address line 2
City: City State: State ZIP: ZIP
Country Short DesCountry Short

The Field Group Properties screen appears for the specific field group with which you are working. For one-to-one field groups, such as **First Name** or **Last Name**, you can select to specify the **Font**, **Background**, and **Edges** for a field group. These same options also appear when you work with one-to-many field groups in a free form layout.

#### Font

To work with font and spacing for a field group, from the Field Group Properties screen, click **Font** on the left of the screen. Several selections appear on the right side of the screen. For example, you can establish the font, color, and style for the field group with which you are working. You can view real-time examples of your selections using the viewing box at the bottom of the screen.

A <u>A F</u> ont	Font(s):	Times New R	oman'		▼
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	Alignment:	Left	<not set=""></not>	Normal	-
	Capitalization:	None	•		
	Indentation:	1 pt	•		
	Letter spacing:	Normal	▼ px ▼		
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	Last Name	: Last Name	1		
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- **Font(s).** In the **Font(s)** field, you can select the type of font you want to apply to the field with which you are working. Examples of font selections include Times New Roman and Arial. To search for different fonts not currently listed in the **Font(s)** field, click the ellipsis to access the Font Picker screen. From the Font Picker screen, you can select additional installed fonts.
- Size. In the Size field, you can select the size you want to apply to the font of the field with which you are working. Examples of size selections include Medium and Small. When you select "Custom" in the Size field, an additional field appears, so you can specify a size not currently listed in the Size field.
- **Color.** In the **Color** field, you can select the color you want to apply to the font of the field with which you are working. Examples of color selections include Black and Blue. To search for different colors not currently listed in the **Color** field, click the ellipsis to access the Color Picker screen. From the Color Picker screen, you can select additional colors to apply to your field.
- **Style.** You can select a **Style** to apply to the field with which you are working. The style options you can select include Underline, Strikethrough, Overline, Italic, Bold, Bolder, and Small Caps. To apply a style, mark the checkbox next to the style selection you want. For example, if you want the font to appear in bold, mark the checkbox next to **Bold**.

- **Alignment.** In the **Alignment** field, you can select the alignment for the field with which you are working. Examples of alignment options include Left and Right. For example, if you select "Left" in the **Alignment** field, the data in a field is lined up on the left side of the custom view screen. When you select "Justified" in the **Alignment** field, additional fields appear where you can specify the alignment.
- **Capitalization.** In the **Capitalization** field, you can select the type of capitalization for the field with which you are working. Examples of capitalization include Initial Cap and lowercase. For example, to set the data in a field to appear as all lowercase letters, select "lowercase" in the **Capitalization** field.
- **Indentation.** In the **Indentation** field, you can enter a number to specify the amount of indentation you want for the field with which you are working. For example, when you enter "1" in the **Indentation** field, you can see that the field text is indented by one. In the adjacent field, you can select the type of measurement to apply to the number you enter. When you enter "1", for example, you can select "px" for pixels or "mm" for millimeters.
- Letter spacing. In the Letter spacing field, you can select a letter-spacing option for the field with which you are working. Your selection in this field determines how much space exists between each letter in the field. For example, when you select "Custom" in the Letter spacing field, you can enter a number in the adjacent field that specifies the amount of space you want between each letter. Once you enter a number, you can specify the measurement for the number. Examples of measurements include px for pixels or mm for millimeters.
- **Line spacing.** In the **Line spacing** field, you can select line-spacing for the field with which you are working. Your selection in this field determines how much space exists between each line in the field. For example, when you select "Custom" in the **Line spacing** field, you can enter a number in the adjacent field that specifies the amount of space you want between each line. Once you enter a number, you can specify the measurement for the number. Examples of measurements include px for pixels or mm for millimeters.
- **Text direction.** In the **Text direction** field, you can select a text direction for the field with which you are working. Your selection in this field determines the direction of the text flow in the field. For example, you can select "Left to right" in the **Text direction** field to specify that the text read from left to right on the custom view screen.

#### Background

To work with background color and imaging for a field group, from the Field Group Properties screen, click **Background** on the left of the screen. Several selections appear on the right side of the screen. For example, you can establish the background color and image position for the field group with which you are working. You can view real-time examples of your selections using the viewing box at the bottom of the screen.

Field Group Use the set	Group Name Here> Properties ings below to change the appearance of this field in your custom screen. The preview bottom shows how the field will look when you apply these settings.	X				
A Font Deckground Edges	Background color  Color:  White  Transparent  Background image  Image: none  Image: Im					
	Iiling:       Do not tile         Scrolling:       Scrolling background         Position         Horizontal:       Center         Vertical:       Custom					
	Do not use background image     Opacity     Clear     The second se					
	First Name: First Name Last Name: Last Name ID: ID					
	OK Cancel					

**Color.** Under **Background color**, in the **Color** field, select a color to apply to the background of the field with which you are working. Examples of color options include White and Blue. To search for different colors not currently listed in the **Color** field, click the ellipsis to access the Color Picker screen. From the Color Picker screen, you can select additional colors to apply to your field.

To make the background color clear, mark the **Transparent** checkbox. No color is used when you mark this checkbox.

**Image.** Under **Background image**, in the **Image** field, select an image you want to use as the background for the field with which you are working. For example, your organization has an annual fundraiser each year that serves as the backbone of your organization. For motivation purposes, you may want to include a background pattern of coins or dollar bills so each time you apply your custom view, a running pattern of money appears as a background image. Remember, adding creativity when designing your custom views can prove both helpful and motivational.

In the **Tiling** field, you can select a tiling style such as tiling in horizontal or vertical directions. For example, to tile a background image in a horizontal direction, in the **Tiling** field, select "Tile in horizontal direction". The background image is tiled so that a smaller picture of the image appears over and over again on the screen. You can choose to tile horizontally, vertically, or both.

In addition, in the **Scrolling** field, you can select the type of scrolling feature you want for the field. For example, when you select "Scrolling background", if a large amount of information appears on the screen, you can scroll up and down or left to right to view the additional data.

- **Horizontal.** Under **Position**, in the **Horizontal** field, you can select where you want to position the background image on the custom view. Examples of horizontal positions include Left and Right.
- **Vertical.** Under **Position**, in the **Vertical** field, you can select where you want to position the background image on the custom view. Examples of vertical positions include Top and Bottom.

If you do not want to use an image as a background image, mark the **Do not use background image** checkbox. When you mark this checkbox, no image is used in the background of the custom view.

**Opacity.** You can select the level of opacity that a background image or color has by using the opacity scale. Opacity is the level of lightness or darkness an image or color has. To lighten the image or color, under **Opacity**, move the line within the opacity scale towards **Clear** or **Solid**, depending on the level of lightness or darkness you want to apply to the background. Remember, the lighter you apply opacity to a background color or image, the easier it is to see the data on top of the background.

#### Edges

To work with border size and padding for a field group, from the Field Group Properties screen, click **Edges** on the left of the screen. Several selections appear on the right side of the screen. For example, you can establish the margins, padding, and border size for the field group with which you are working. You can view real-time examples of your selections using the viewing box at the bottom of the screen.

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	Bottom	1	рx	1	рх		
	Left	1	рx	1	рх		
	Right	1	рх	1	рх		
	Borders						
	Border		Style		Width	Color	
	All	Solid Line		Custon	า 🛛	black	
	Тор	Solid Line		Custom		black	
	Bottom	Solid Line		Custom		black	
	Left	Solid Line		Custom		black	
	Right	Solid Line		Custom		black	
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	First Nam	ie: Fi	rst Nam	e			
	Last Nam	e: La:	st Name	e			
	Last Name: Last Name ID: ID						

- Margins and Padding. Under Margins and Padding, you can establish margin and padding settings for the field with which you are working. Three columns exist for you to establish settings: Side, Margin, and Padding. The Side column designates which part of the field you are setting. For example, you can work with the Left side of a field group, or All sides. When you decide which side you want to set, establish the settings you want using the corresponding Margin and Padding columns. For example, to set All sides of a field group to have a one-pixel margin and a one-pixel padding, enter "1" in the first row of the first column under Margins. In the second row of the first column under Margins, select "px". In the first row of the first column under Padding, enter "1".
- **Borders.** Under **Borders**, you can establish style, width, and color settings for the field with which you are working. Four columns exist for you to establish settings: **Border**, **Style**, **Width**, and **Color**. The **Border** column designates which part of the field you are setting. For example, you can work with the **Left** side of a field group, or **All** sides. When you decide which border you want to set, establish the settings you want using the corresponding **Style**, **Width**, and **Color** columns. For example, to set **All** sides of a field group to have a solid line, a custom width, and a black border, select **Solid Line** in the first row under the **Style** column. In the first row under the **Width** column select **Custom**. In the first row under the **Color** column, select **Black**.

#### Grid

When you work with one-to-many field groups, such as **Gifts** or **Tributes**, in a grid layout, your selections change slightly. With one-to-many field groups in a grid layout, you can work with background color, image, margin, and padding settings. From the Field Group Properties screen, click **Grid** on the left of the screen. Under **Grid**, the **Background** and **Edges** buttons are enabled. To set basic grid properties, click either **Background** or **Edges**. For more information about background and edges options, see "Background" on page 25 and "Edges" on page 26.

Field Group - <pu< th=""><th>ut Group Name Here&gt;</th><th>×</th></pu<>	ut Group Name Here>	×
Field Group Use the set pane at the	<b>Properties</b> ettings below to change the appearance of this field in your custom screen. The preview e bottom shows how the field will look when you apply these settings.	
Grid Packground Edges	Background color         Color:       White         Transparent         Background image         Image:       Image:         Jiling:       (Not Set>)         Scrolling:       (Not Set>)         Position       Image:         Horizontal:       Custom         Vertical:       Custom         Do not use background image         Opacity         Clear       Solid	
<u>H</u> eaders <u>R</u> ows	Sample Row 1 Sample Row 2	
	OK Cancel	

#### Headers

When you work with one-to-many field groups, such as **Gifts** or **Tributes**, in a grid layout, your selections change slightly. With one-to-many field groups in a grid layout, you can work with heading settings. From the Field Group Properties screen, click **Headers** on the left of the screen. Under **Headers**, the **Font** and **Background** buttons are enabled. To set basic heading properties, click either **Font** or **Background**. For more information about font and background options, see "Font" on page 23 and "Background" on page 25.

Field Group - <pu< th=""><th>t Group Name</th><th>Here&gt;</th><th></th><th></th><th>×</th></pu<>	t Group Name	Here>			×
	tings below to ch		arance of this field in look when you apply		n. The preview
Grid Headers	Eont(s):	Times New R	oman'		▼
A Font	<u>S</u> ize	Custom	▼ pt	-	
🖄 <u>B</u> ackground	<u>C</u> olor:	White	▼		
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	Text direction:	<not set=""></not>	•		
	Preview				
	Constituent C	ode	Date	Gift ID	Pay method
<u>R</u> ows	Sample Row Sample Row				
		OK	Cancel		

#### Rows

When you work with one-to-many field groups, such as **Gifts** or **Tributes**, in a grid layout, your selections change slightly. With one-to-many field groups in a grid layout, you can work with row settings. From the Field Group Properties screen, click **Rows** on the left of the screen. Under **Rows**, the **Font** and **Background** buttons are enabled. To set basic row properties, click either **Font** or **Background**. For more information about font and background options, see "Background" on page 25 and "Edges" on page 26.

<u>G</u> rid Headers	Eont(s):	Times New R	oman'	-
Rows	<u> </u> ize	Custom	T pt T	
Eont	<u>C</u> olor:	<not set=""></not>	<b>▼</b>	
Background B	Style:	Underline	☐ Stri <u>k</u> ethrough ☐ <u>O</u> verline ☐ <u>B</u> old ☐ Bolder ☐	S <u>m</u> all Ca
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	Text direction:	<not set=""></not>	<b>•</b>	
	Preview			
	Constituent C	ode	Date Gift ID Pay meth	

#### Select Group Style Screen

When you drag and drop one-to-many fields, such as **Gifts** group fields, the Select Group Style screen appears, asking you to select between two set-up options, **Grid Layout** and **Free Form Layout**. When you include one-to-many fields such as **Gifts** group fields, you are selecting a field group that will ultimately contain several fields. For example, when you drag and drop the **Gifts** group or any fields under it, such as **Amount** or **Date**, the Select Group Style screen appears, asking you to select the layout option you want for the **Gifts** group fields. Once you select the layout and apply the custom view, all gift information included for a constituent record appears under each related field in the custom view.

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The Select Group Style screen appears only when you select to include a one-to-many field group for the Custom View Designer screen. Depending on your selection for this screen, you can view an example of what each selection looks like in the example boxes to the right of the option.

ct Group Style						
Group Style			N 1 7 1			
Select the format y	ou would like to u	se for displaying	) multiple rows of da	ata.		
	r					
	Name	Address 1	City	State	Zip	
	John Lennon	1 Maple St.	Mount Pleasant	SC	29466	
	George Harrison	1 Pine St.	Mount Pleasant	SC	29401	
C C ill -	Paul McCartney	1 Flora Ln.	Charleston	SC	29402	
Grid Layout	Ringo Star	1 Maple St.	Framingham	MA	01760	
	John Lennon					
	1 Maple St.					
		SC 29466				
	1 Maple St. Mount Pleasant					
⊖ Free Form	1 Maple St. Mount Pleasant George Harrisor					
© Free Form Layout	1 Maple St. Mount Pleasant	n				
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	1 Maple St. Mount Pleasant George Harrisor 1 Maple St. Mount Pleasant Paul McCartney	n SC 29466				
	1 Maple St. Mount Pleasant George Harrisor 1 Maple St. Mount Pleasant	n SC 29466		/		
	1 Maple St. Mount Pleasant George Harrisor 1 Maple St. Mount Pleasant Paul McCartney	n SC 29466	_			
	1 Maple St. Mount Pleasant George Harrisor 1 Maple St. Mount Pleasant Paul McCartney 1 Flora Ln.	n SC 29466	_	/		
	1 Maple St. Mount Pleasant George Harrisor 1 Maple St. Mount Pleasant Paul McCartney 1 Flora Ln.	n SC 29466		/		

Once you select to include a one-to-many field group, you can then only add fields to that group if the fields are in the same group. For example, when you select the **Gifts** group, you can only drag and drop fields into that **Gifts** group on the Custom View Designer screen if the fields belong to the **Gifts** group. You can recognize the fields belonging to a group from the Fields screen. For more information about one-to-many field groups, see "One-to-Many Field Groups" on page 15.

**Grid Layout.** A grid layout displays a grid with columns. Each field in the grid appears as a column heading. For example, you create a custom view including **Gifts** group fields. You include the **Amount** and **Date** fields within that group. Every **Amount** and **Date** for each gift stored on a constituent record appears, based on criteria settings, when you apply that particular custom view to a constituent record.

When you organize your custom views, you may need to include the same field group more than once because you may not be able to fit all the fields you want into one grid layout. For example, if you include the **Actions** field group and you want to include ten different fields within the **Actions** group, depending on how you organize your screen, you may not be able to realistically view all ten fields. To view all fields, you may want to include a second **Actions** field group. When applying a custom view that contains a grid layout of a field group, if many lines of data exist in the grid, a scroll bar appears on the right side of the grid, making it possible to view all existing data.

You can also establish properties, criteria, and grid settings for a grid layout field group. For more information about establishing properties, see "Field Group Properties Screen" on page 22.

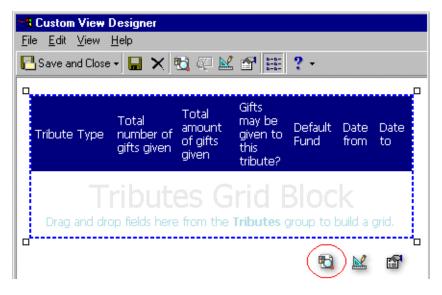
**Free Form Layout.** A free form layout appears just as it sounds. You can organize the layout in any free-flowing format you want. By doing this, you can move the fields around within the free form block. Unlike the grid layout, you can organize the fields and move them around in the position you want them to appear. For example, you create a custom view and you include the **Notes** field group as a free form layout. You then include the **Added By** and **Description** fields within that field group. Once you add the fields, you can then move them around and organize them inside of the free form block.

You can also establish properties for a free form layout field group. For more information about establishing properties, see "Field Group Properties Screen" on page 22.

#### **Criteria Settings**

**Note**: You can also specify criteria for a field group by selecting **Edit**, **Criteria** from the menu bar or by clicking the **Criteria** button on the toolbar.

When you select to include a one-to-many field group, such as the **Tributes** field group, and select to view the field group as either a grid layout or free form layout, you can set criteria for the field group. To apply criteria to a field group, click the field group block so the block is highlighted. Once the block is highlighted, click the **Criteria** button located on the bottom right corner of the field group block.



Tip: In any date field, you can press F3 on your keyboard for today's date or F7 for a calendar.

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Depending on the type of field group with which you are working, different criteria screens appear. The purpose for setting criteria for a field group is to narrow down the information shown in a field group. For example, when you click the **Criteria** button for the **Tributes** field group, the Tributes screen appears. On this screen, you can select the type of tributes you want to show, whether or not you want to show inactive tributes, and tributes that have a specific start and end date. You can establish criteria settings for each one-to-many field group listed on the Fields screen.

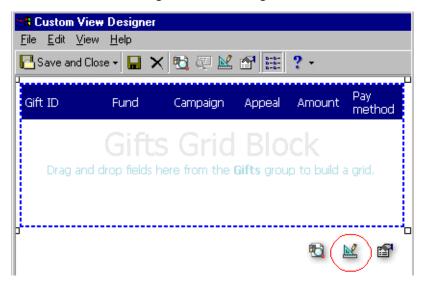
Tributes		×
For each Constituent, enter the	e numb	er of Tributes to show: 4
C All Tributes 💿 Selected Tri	butes	
For the Benefit Of	1888	In Honor Of
For the Scholarship Of		In Memory Of
In Bequest Of		
In Special Recognition Of	<b>)</b>	
In Support Of	>>	
For the Birth of		
For the Birthday of	<	
For the Marriage of	~	
For the Anniversary Of		
In Celebration Of		
Show inactive entries		🗖 Order by
Start Date:		<no order="" specific=""></no>
End Date:		© Ascending O Descending
Include Tributes not marked a	as 'Gifts	may be given to this tribute'
ОК		Cancel

All Criteria screens you work with in a custom view are the same Criteria screens you work with in the *Export* module. For detailed information about criteria screens, see the *Query & Export Guide*.

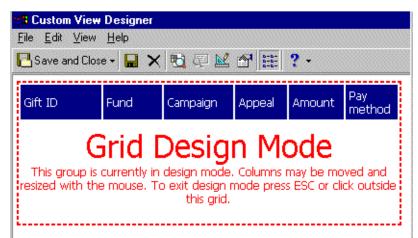
#### **Edit in Grid Design**

**Note**: You can also enter Edit mode for grid design by selecting **Edit**, **Edit** from the menu bar of a custom view, or by clicking the **Edit** button on the toolbar of a custom view.

When you select to include a one-to-many field group, such as the **Gifts** group, and select to view the field group as a grid layout, you can alter the look of the grid by applying grid design mode to the grid block. To apply grid design mode, click the grid block so the block is highlighted. Once the grid is highlighted, click the **Edit** button located on the bottom right corner of the grid block.



Once you enter grid design mode for a field group, the grid block appears in red. You can then move the columns around the screen as you want them to appear. You can also resize the columns using your mouse, and rename the field columns. To rename a field column, double-click field. Editing in grid design mode can be useful if you want to make the column size smaller, so you can include more fields.

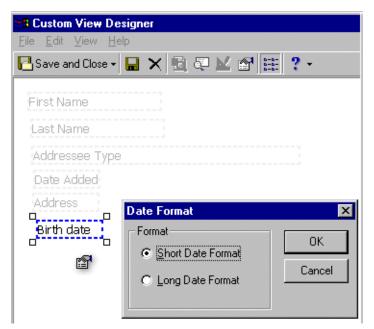


### Formatting

**Note**: You can also specify formats for a field by selecting **Edit**, **Format** from the menu bar or by clicking the **Format** button on the toolbar.

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On the Custom View Designer screen, you can format fields such as date fields and addressee/salutation fields. Using the **Format** button on the toolbar, you can set specific formats for fields. For example, when you select and highlight any date field, such as the **Birth date** field, you can click the **Format** button. Once you click the **Format** button, a Date Format screen appears where you can specify long or short date format. *Custom View* uses formatting options for all fields in the *Export* module. For detailed information about formatting options for export fields, see the *Query & Export Guide*.



# **Constituent Record**

Once you create custom views, you an easily apply them to a constituent record. The idea of *Custom View* is to help you create views that are beneficial. You can create one or many, depending on your working needs. You can also easily switch back and forth between different custom views. In addition, within a custom view, you can easily create links to other custom views. It is important to remember that a custom view is view-only. You cannot add, edit, or delete any constituent record information directly from a custom view. You must switch back to constituent record mode, or Edit mode, to add or change any information. You can work with some functionality in the constituent record, such as running summaries and creating letters, but you cannot edit field information for the record.

**Note**: You can also apply a custom view by selecting **View**, **Custom View** from the menu bar of a constituent record.

To apply a custom view or switch back to Edit mode for a constituent record, from the constituent record, click the **Run Custom View** button on the toolbar.

🛚 Max G. Tay	lor	
ile Edit View	Constituent Letter Favorites Tools Help	$\sim$
💾 Save and Clo	ose - 🔚 🎒 - 👌 - 🗐 - 🖊 4 🔸 🕅	→ Σ· 🕿 ♡ 💿 🖆 🚍 ? · 💐 📳
✓ Attributes ✓ Bio 1	Media         Actions         Honor/Memorial           Bio 2         Addresses         Addresses/Salut	
-Biographical-		Preferred Address - Home
Last name:	Taylor Aliases	Country: United States 💽 💌 More
First name:	Max	Address lines: 3327 Dawson Street
Middle name:	Gerome	
Titles:	Mr.	City: Pittsburgh
Suffixes:		State: PA 💌 Pennsylvania
Nickname:		ZIP: 15208 DPC:
Maiden name:		Phones/E-mail/Links
ID:	77	Type Number/E-mail Address
Gender:	Male SSN: 229-13-4356	Home 403-555-4579
Birth date:	07/05/1940 💌 Age: 63	
	Deceased? Date:	
Marital status:	Married	This constituent
Spouse	Michelle Taylor	☐ Is inactive
Solicit code:		Requests no e-mail
Grandparent (0	4/04/2001 - ); Alumnus (06/01/1962 - )	
Granuparent (U	470472001 - J. Aluminus (0670171362 - )	✓ Education ✓ Business Bank

Once you click the **Run Custom View** button, a list of existing custom views appears to the side of the button. Here, you can select the custom view you want to apply by highlighting the custom view name. Immediately, the custom view is applied to the open constituent record, and the custom view name appears in the title bar.

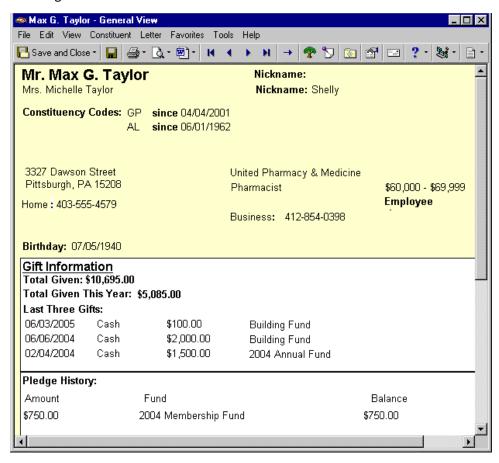
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File Edit View Cons	stituent Letter Favorites Tools Help	
🎦 Save and Close 📲	<b>■</b> ⊕· <u>0</u> · <b>∞</b> · <b>Η ↓ →</b> Σ· <b>જ ℃ ∞ ∞ ≈</b> ?· <b>⊗</b> ·	-
🗸 Attrib <u>u</u> tes 🗎 <u>M</u>	1edia 📔 🗸 Actions 📔 🗸 Honor/Memorial 📄 Volunteer 📄 🗸 Prospect 📔 🗸 Member	<edit mode=""></edit>
🗸 Bio <u>1</u> 🗸 Bio	2 🗸 Addresses 🗸 Addressees/Salutations 🖌 🗸 Relationships 🗍 🗸 Appeals 📘	Education
- Biographical	Preferred Address - Home	Membership
Last name: Taylor		Prospect
		Standard
First name: Max	Address lines: 3327 Dawson Street	Volunteer
Middle name: Gerom		<b>T</b>

Each time you apply a custom view to a constituent record, any subsequent records opened also have the same view applied. This is because *Custom View* remembers the last view you applied to a record. For example, if you open Max Taylor's constituent record and apply the Biographical custom view, then each record opened thereafter has the same view. Even when you close *The Raiser's Edge*, *Custom View* remembers the last view applied. The last view applied can also be Edit mode view. Edit mode view is simply the constituent record in a normal view, without an applied custom view.

In addition, *Custom View* does not have to be open to apply a custom view to a constituent record. Once you create and save a custom view, the custom view appears as a menu option when you click **Run Custom View** on a constituent record toolbar.

### **Custom View Mode**

You can apply any existing Custom view to a constituent record. When you apply a custom view, you are in Custom view mode. To apply a custom view, from a constituent record toolbar, click the **Run Custom View** button. A list of all existing custom views appears to the side. Select the custom view you want to apply by highlighting the custom view. The custom view is immediately applied to the constituent record. You can easily switch back to Edit mode by clicking the **Run Custom View** button on the constituent record toolbar, and selecting **<Edit mode>**.



### Edit Mode

Edit mode is the normal view of a constituent record, with no custom view applied. You can easily switch back to Edit mode by clicking the **Run Custom View** button on the constituent record toolbar, and selecting **<Edit mode>**.

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<ul> <li>Attributes</li> </ul>	Media Actions Honor/Memorial Bio 2 Addresses Addressees/Saluta	Volunteer V Prospect V Membe	
✓ Bio <u>1</u>	✓ Bio 2 ✓ Addresses ✓ Addressees/Saluta	· · · · · ·	<u>N</u> Education Membersh
liographical — Last name:	Taular	Preferred Address <u>-</u> Home Country: United States	- Prospect
			Standard
First name:		Address lines: 3327 Dawson Street	Volunteer
Middle name:	Gerome		
Titles:	Mr.	City: Pittsburgh	
Suffixes:		State: 🛛 💌 Pennsylvania	
Nickname:		ZIP: 15208 🙀 DPC:	
Aaiden name:		Phones/E-mail/Links	
ID:	77	Type Number/E-mail Add	dress
Gender:		Home 403-555-4579	
	07/05/1940 I Age: 63		
biith date.			
	Deceased? Date:	This constituent	
Marital status:	Married	I his constituent I is inactive  ✓ Is a s	olicitor 🗸 🗸 Det
Spouse	Michelle Taylor	Gives anonymously	no valid addresse
Solicit code:		🗖 Requests no e-mail	

### **Custom View Samples**

*Custom View* samples are views designed and shipped with *The Raiser's Edge*. Samples are beneficial in many ways. For example, they give you creative ideas about organizing and building your own custom views. You can also save parts of a sample to use as a building block later in the custom views you create. The idea of a sample is to offer a view that may be helpful to you, while allowing you to take parts from the existing views to use as you see fit.

To access the Sample Installer, select **Tools**, **Install Samples** from the menu bar of **The Raiser's Edge** shell. The Samples screen appears.

Select <u>A</u>	ul 🔲 <u>D</u> eselect	All 🛱 Eind		📲 Install <u>N</u> ow 🔏 <u>C</u> ano
Install?	Category	Туре	Name	Description
	Custom Views	Individual	Education	Blackbaud sample containing education, relations
	Custom Views	Individual	Membership	Blackbaud sample containing membership history
2	Custom Views	Individual	Prospect	Blackbaud sample containing prospect, proposal,
V	Custom Views	Individual	Standard	Blackbaud sample containing giving history, action
	Custom Views	Individual	Volunteer	Blackbaud sample containing volunteer informatic

You do not need install these samples on your own, however if you delete a specific sample and want to reinstall the sample, you can use the Sample Installer to select the sample custom view you want to reinstall. For more information about viewing and installing sample custom views, see the *Program Basics Guide*.



# Creating and Using Custom Views

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## Using Custom View

Note: Custom View is shipped with The Raiser's Edge and is located in Configuration.

With *Custom View* for *The Raiser's Edge*, you can create a customized view of individual and organization constituent records in your database, making it possible to view records containing only the information you want to see. By creating these customized screens, you can select and view only what is important and functional for your organization. Every field currently available on a constituent record may not be useful to you. Using *Custom View*, you can easily select and organize only the fields you want to appear for a constituent record. By using this customized viewing functionality, you can view constituent records in a way that specifically caters to you. For example, you want to create a view that includes action information for a constituent. You can create a view listing action fields such as **Action Date** and **Start Time**. When you want to view only such information for a constituent, you can apply the actions custom view.

Note: For more information about constituent records, see the Constituent Data Entry Guide.

The following sections describe procedures you can use to create, edit, save, and delete custom views. The procedures also provide details on establishing properties and criteria for field groups included in your custom views. For more information about *Custom View* and overall description of this module, see "Custom View Quick Start" on page 1.

### Creating a Custom View

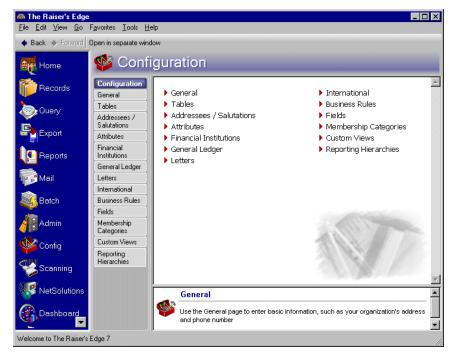
With *Custom View*, you can create new custom views with a new layout. You can also create custom views using saved parts from existing custom views, as well as from templates shipped with the program. In addition, you can use saved parts from within templates to build custom views. Once you begin building custom views, it is important to get in the habit of saving parts, such as a text label or image, so that you can use those saved parts when creating new views. This is helpful when you want to add standard, uniform features to the custom views you create. When you base your custom view layout and organization on this "building block" method, it is more beneficial to you because you are using functional objects that already exist, as opposed to creating brand new custom views each time you create a view.

The key to using *Custom View* is to understand why you are creating a new constituent record view in the first place. Understanding what you need to include, such as fields, text labels, and roll up links is essential to creating views that are useful for you. In addition, feel free to be creative! With *Custom View*, you can use many flexible objects such as images, frames, background colors, and borders.

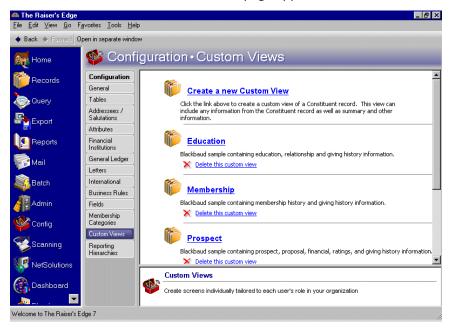
#### Creating a custom view for an individual record

**Scenario:** You are the Volunteer Coordinator for your organization. Because you work with mostly volunteer information for consituents in your database, you want to create a custom view that provides useful, constituent volunteer contact information. Using *Custom View*, develop a view containing only basic biographical and volunteer contact information for an individual constituent record.

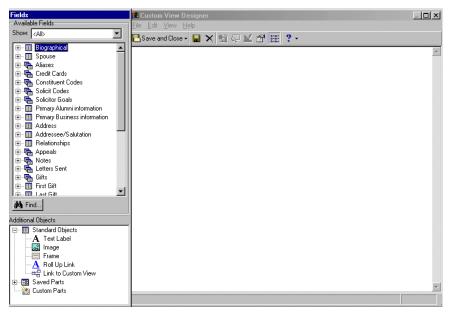
1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.



2. Click Custom Views. The Custom Views page appears.



3. Click Create a new Custom View. The Custom View Designer and Fields screens appear.



4. From the Fields screen, in the **Additional Objects** box, highlight **Text Label** under **Standard Objects**. Drag and drop it to the Custom View Designer screen. You want to use a label to identify groups of fields you include on the screen. To rename the text label, double-click the text label and enter a name, such as "Basic Biographical Information".

Fields	Custom View Designer	- 🗆 ×
Available Fields	<u>File Edit View Help</u>	
Show: <all></all>		
Biographical         Biographical	Basic Biographical Information	
🗐 🕀 🔠 First Gift	1	
💏 Find		
Additional Objects		
Standard Objects     A Text Label     Gamma Control Control     Frame     A Roll Up Link     Control Link to Custom View		
		~
🦾 🥘 Custom Parts		

You can position the text label anywhere on the Custom View Designer screen. For this example, the text label is positioned in the upper left corner of the screen.

5. From the Fields screen, in the **Additional Objects** box, highlight **Frame** under **Standard Objects**. Drag and drop it to the Custom View Designer screen. You want to use a frame to encompass basic biographical information.

You can position the frame anywhere on the Custom View Designer screen. For this example, the frame is positioned in the upper left corner of the screen.

6. From the Fields screen, in the **Available Fields** box, click the plus sign to the left of the **Biographical** field group. The list of fields related to the **Biographical** group appears.

Fields Available Fields	🖪 Custom View Designer	
	<u>E</u> ile <u>E</u> dit <u>V</u> iew <u>H</u> elp	
Show: <all></all>	🖪 Save and Close + 🔒 🗶 🗟 🖾 🖉 🏥 ? +	
Biographical     Academy Date Last Change     Academy Last Changed By     Academy Last Changed By     Address     Address     Address     Address     Annotation Auto Display?     Annotation Auto Display?     Annotation Auto Display?     Constituent is a solicitor?     Constituent is a nonor/mem     Date Addred     R Date Last Changed     M Find	Basic Biographical Information First Name: First Name Last Name: Last Name ID: ID Birth date: Birth date Age: Age Address: Address	×
Additional Objects		
Standard Objects     A Text Label     Galainage     Frame     AROUPLINK     Could be link     Cou		Ŧ

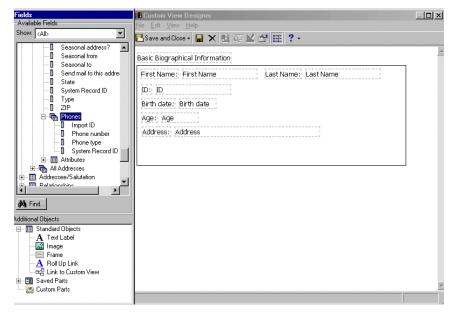
**Note**: To include a field label with a field, from the Fields screen press the **CTRL** key on your keyboard and highlight the field. Once you drag and drop the field onto the Custom View Designer screen, the field and its field label appear on the screen.

- 7. Highlight the **First Name** field and drag and drop it into the frame on the Custom View Designer screen. The **First Name** field now appears in the frame on the Custom View Designer screen.
- 8. Using the same selection method, drag and drop the following fields to the Custom View Designer screen: Last Name, ID, Birth date, Age, and Address.
- 9. From the Fields screen, in the **Available Fields** box, click the plus sign to the left of the **Address** field group. The list of fields related to the **Address** group appears.

**Note**: Once you drag and drop a field label and field to the Custom View Designer screen, press the **CTRL** key on your keyboard and click the field label and field name to highlight both. When you highlight both using this method, you can move both the field label and field name on the screen. This is helpful when you want to move both to maintain alignment.

10. Click the plus sign to the left of the Preferred Address group to reveal the Preferred Address field names.

11. Click the plus sign to the left of the **Phones** group to reveal the **Phones** field names.

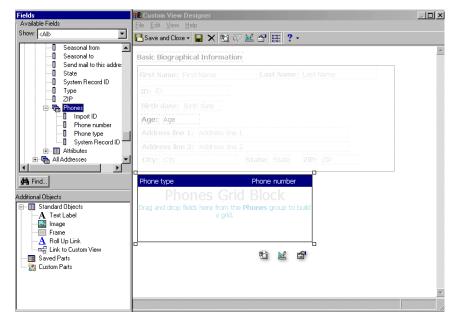


12. Highlight the **Phone type** field and drag and drop it to the Custom View Designer screen. The Select Group Style screen appears.

						×
🔊 Group Style						
Select the format y	iou would like to us	se for displauing	multiple rows of da	ata		
Select the formatly		se for displaying	maidple rows or de	a(a.		
	<b></b>					_
	Name	Address 1	City	State	zip	
	John Lennon	1 Maple St.	Mount Pleasant	SC	29466	
	George Harrison	1 Pine St.	Mount Pleasant	SC	29401	
0.0.11	Paul McCartney	1 Flora Ln.	Charleston	SC	29402	
Grid Layout	Ringo Star	1 Maple St.	Framingham	MA	01760	
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		SC 29466				
	1 Maple St. Mount Pleasant					
- Free Form	1 Maple St. Mount Pleasant George Harrisor					
C Free Form	1 Maple St. Mount Pleasant George Harrisor 1 Maple St.	1				
C Free Form Layout	1 Maple St. Mount Pleasant George Harrisor	1				
	1 Maple St. Mount Pleasant George Harrisor 1 Maple St.	1				
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	1 Maple St. Mount Pleasant George Harrisor 1 Maple St. Mount Pleasant Paul McCartney	1				
	1 Maple St. Mount Pleasant George Harrisor 1 Maple St. Mount Pleasant Paul McCartney 1 Flora Ln.	SC 29466		/		
	1 Maple St. Mount Pleasant George Harrisor 1 Maple St. Mount Pleasant Paul McCartney 1 Flora Ln.	SC 29466	_			
	1 Maple St. Mount Pleasant George Harrisor 1 Maple St. Mount Pleasant Paul McCartney	SC 29466	_			
	1 Maple St. Mount Pleasant George Harrisor 1 Maple St. Mount Pleasant Paul McCartney 1 Flora Ln.	SC 29466	~	/		
	1 Maple St. Mount Pleasant George Harrisor 1 Maple St. Mount Pleasant Paul McCartney 1 Flora Ln.	SC 29466	_	/		
	1 Maple St. Mount Pleasant George Harrisor 1 Maple St. Mount Pleasant Paul McCartney 1 Flora Ln.	SC 29466	~	/		Cancel

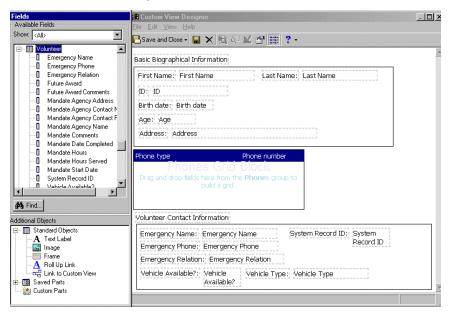
The Select Group Style screen appears because you selected to drag and drop a one-to-many field. Any time you select a one-to-many field, a screen appears, asking you to select to view the field in **Grid Layout** or **Free Form Layout**. For more information about one-to-many field groups, see "One-to-Many Field Groups" on page 15.

13. Select **Grid Layout**. You want to view the **Phone type** field as a grid. The **Phone type** field now appears on the Custom View Designer screen.



- 14. In the **Available Fields** box, under the **Phones** field group, highlight the **Phone number** field and drag and drop it to the Phones Grid Block.
- 15. Using the same selection methods in the steps above, drag and drop a second **Text Label** and **Frame** to the Custom View Designer screen. In addition, drag and drop volunteer contact fields such as **Emergency Name** and **Emergency Phone** as seen on the following screen.
- Note: Use the scroll bar to the right of the Custom View Designer screen to view all information on the screen.

Remember when you select to drag and drop one-to-many fields, you are asked to select a group style. Your Custom View Designer screen should look similar to the one below.



**Warning**: You can save a custom view with a view format of individual, organization, or both. This determines the type of constituent record to which you can apply the custom view. For example, you can only apply custom views with an individual format to individual constituent records. If you choose to save a custom view with a view format of both, you can apply that custom view to both individual and organization records. For more information about saving a custom view, see "Saving a custom view" on page 64.

Once you finish adding the fields and objects you want to the Custom View Designer screen, you can establish properties, criteria, and grid design settings for the field groups you included. For more information about establishing these settings, see "Setting Properties, Criteria, Grid Design, and Format for a Custom View" on page 53.

16. To save the information entered in the custom view and close the Custom View Designer and Field screens, click **Save and Close** on the toolbar. You return to the Custom Views page. For more information about saving a custom view, see "Saving a Custom View" on page 63.

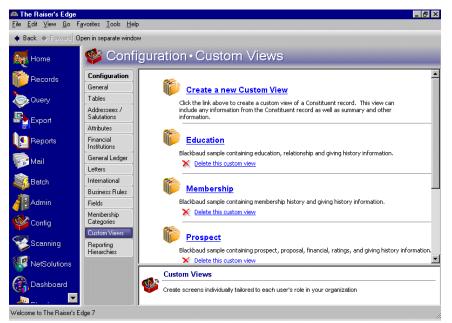
#### Creating a custom view for an organization record

**Scenario:** You are the Matching Gift Coordinator for your organization. You need easy access to contact and matching gift information for your constituent records. Because of this, you want to set up a custom view to include basic name, address, and contact information for organizations in your database, as well as matching gift information. You want to view whether or not an organization matches gift; and if so, all contact and matching gift information for an organization. Using *Custom View*, create a custom view that includes this information for an organization constituent record.

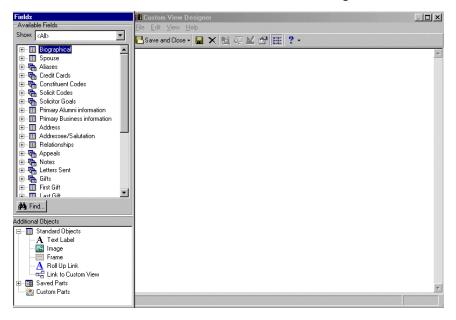
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<u>File Edit View Go</u>	F <u>a</u> vorites <u>T</u> ools <u>H</u> e	elp	
◆ Back → Forward	Open in separate wind	low	
💓 Home	搫 Confi	guration	
Pecords	Configuration General Tables Addressees / Salutations Attributes	General General Addressees / Salutations Addressees / Salutations Attributes	<ul> <li>International</li> <li>Business Rules</li> <li>Fields</li> <li>Membership Categories</li> </ul>
Reports	Financial Institutions General Ledger	<ul> <li>Financial Institutions</li> <li>General Ledger</li> <li>Letters</li> </ul>	<ul> <li>Custom Views</li> <li>Reporting Hierarchies</li> </ul>
Mail	Letters International		
Satch 🖏	Business Rules Fields		
Admin	Membership Categories		and the second
Config	Custom Views		
Scanning	Reporting Hierarchies		
VetSolutions		General	
Dashboard		Use the General page to enter ba and phone number	isic information, such as your organization's address
Welcome to The Raiser's	s Edge 7		

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

2. Click Custom Views. The Custom Views page appears.



3. Click Create a new Custom View. The Custom View Designer and Fields screens appear.



4. From the Fields screen, in the **Additional Objects** box, highlight **Text Label** under **Standard Objects**. Drag and drop it to the Custom View Designer screen. You want to use a label to identify groups of fields you are including on the screen. To rename the text label, double-click the text label and enter a name, such as "Org Name and Address".

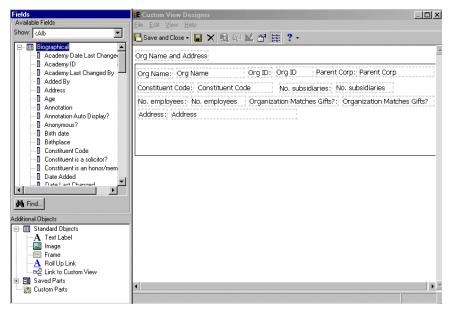
Fields	🗜 Custom View Designer	
Available Fields	File Edit View Help	
Show: <all></all>	🕒 Save and Close + 🔒 🗶 🗟 💷 🚰 🧱 ? -	
Biographical     Spouse     Spouse     Galaxes     Galaxes	Org Name and Address	
Addional Objects → Standard Objects → A Text Label France → A Roll Up Link → C Link to Custom View ⊕  Saved Parts → Q Custom Parts		Ŧ

You can position the text label anywhere on the Custom View Designer screen. For this example, the text label is positioned in the upper left corner of the screen.

5. From the Fields screen, in the **Additional Objects** box, highlight **Frame** under **Standard Objects**. Drag and drop it to the Custom View Designer screen. You want to use a frame to encompass the basic organization name and address information.

You can position the frame anywhere on the Custom View Designer screen. For this example, the frame is positioned in the upper left corner of the screen.

6. From the Fields screen, in the **Available Fields** box, click the plus sign to the left of the **Biographical** field group. The list of fields related to the **Biographical** group appears.

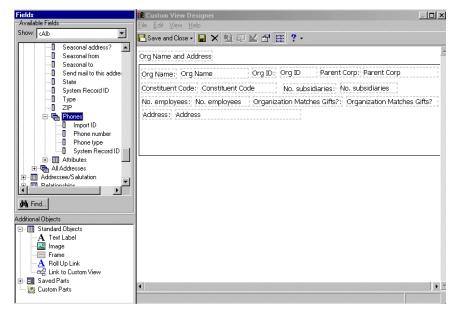


**Note**: To include a field label with a field, from the Fields screen press the **CTRL** key on your keyboard and highlight the field. Once you drag and drop the field onto the Custom View Designer screen, the field and its field label appear on the screen.

- 7. Highlight the **Org Name** field and drag and drop it into the frame on the Custom View Designer screen. The **Org Name** field now appears in the frame on the Custom View Designer screen.
- 8. Using the same selection method, drag and drop the following fields to the Custom View Designer screen: Org ID, Constituent Code, No. employees, No. subsidiaries, Organization Matches Gifts?, Parent Corp, and Address.
- 9. In the **Available Fields** box, click the plus sign to the left of the **Address** field group. The list of fields related to the **Address** group appears.

**Note**: Once you drag and drop a field label and field to the Custom View Designer screen, press the **CTRL** key on your keyboard and click the field label and field name to highlight both. When you highlight both using this method, you can move both the field label and field name on the screen. This is helpful when you want to move both to maintain alignment.

- 10. Click the plus sign to the left of the Preferred Address group to reveal the Preferred Address field names.
- 11. In the **Available Fields** box, click the plus sign to the left of the **Phones** group to reveal the **Phones** field names.



12. Highlight the **Phones** field group and drag and drop it to the Custom View Designer screen. The Select Group Style screen appears.

		se tor displaying	1 multiple rows of d	ala.		
	_					_
			6.0k		-	
	Name John Lennon	Address 1 1 Maple St.	City Mount Pleasant	State	29466	
	George Harrison	1 Pine St.	Mount Pleasant	SC	29400	
_	Paul McCartney	1 Flora Ln.	Charleston	SC	29402	
Grid Layout	Ringo Star	1 Maple St.	Framingham	MA	01760	
	John Lennon 1 Maple St.					-
		SC 29466				
	1 Maple St. Mount Pleasant					
Free Form	1 Maple St. Mount Pleasant George Harrison					
Free Form Layout	1 Maple St. Mount Pleasant George Harrison 1 Maple St.	1				
	1 Maple St. Mount Pleasant George Harrison	1				
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	1 Maple St. Mount Pleasant George Harrisor 1 Maple St. Mount Pleasant Paul McCartney	9C 29466		_		
	1 Maple St. Mount Pleasant George Harrisor 1 Maple St. Mount Pleasant Paul McCartney 1 Flora Ln.	SC 29466		_		
	1 Maple St. Mount Pleasant George Harrisor 1 Maple St. Mount Pleasant Paul McCartney	SC 29466		_		/

The Select Group Style screen appears because you selected to drag and drop a one-to-many field group. Any time you select a one-to-many field group, a screen appears asking you to select to view the field group in **Grid Layout** or **Free Form Layout**. For more information about one-to-many field groups, see "One-to-Many Field Groups" on page 15.

13. Select **Free Form Layout**. You want to view fields in the **Phones** field group in free form layout. The Phones block now appears on the Custom View Designer screen.

Fields	🗄 Custom View Designer
Available Fields	<u>F</u> ile <u>E</u> dit <u>V</u> iew <u>H</u> elp
Show: <all></all>	💽 Save and Close + 📓 🗙 💼 🖓 🔛 🔐 🏢 ? +
Seasonal address?     Seasonal from     Seasonal from     Seasonal from     Seasonal to this addre     State     State     System Record ID     Type     ZIP     Fromes     Import ID     Phone number     O     System Record ID     Syste	Org Name and Address         Org Name:       Org Name         Org Name:       Org ID:         Org Name:       Org Name         Org Name:       Org ID:         Org Name:       Org Name         Org Name:       Org ID:         Org Name:       Org Name         Org Name:       Org Name         Org Name:       Org ID:         Org Name:       Org Name         Org Name:       Org Name <t< td=""></t<>
Althbutes	Phone type: Phone type Phone number: Phone number
Additional Objects	
Standard Objects     A Text Label     Gall Index     Frame     AR Index Init     Text Label     Gall Init     Castom View     Gell Init     Gall Value	
Custom Parts	

14. In the **Available Fields** box, under the **Phones** field group, highlight the **Phone type** and **Phone number** fields and drag and drop them to the Phones block.

15. From the Fields screen, in the Additional Objects box, highlight Link to Custom View under Standard Objects. Drag and drop Link to Custom View to the Custom View Designer screen. You want to include a link to another custom view. The Select custom view screen appears.

Selec	t custom view 🗙
e	Link to existing view
	To insert a link to an existing view, select the view from the list below and click OK.
Availa	ble custom views:
Basic I Gift Hi	
Rentol and	story
1	
	OK Cancel

Creating links to other custom views is useful if you want to jump quickly to another existing custom view. This may be useful if another custom view includes related information that you want to see.

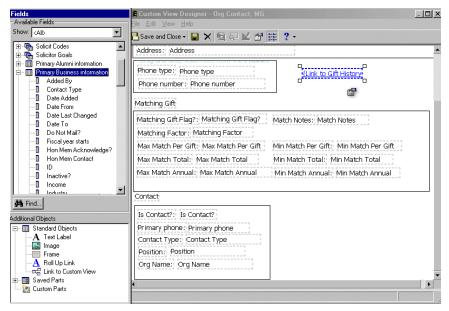
- 16. In the **Available custom views** box, highlight the custom view for which you want to create a link.
- 17. Click **OK**. A link to the custom view you selected now appears on the Custom View Designer screen.

Fields	🔠 Custom View Designer
Available Fields	<u>File Edit V</u> iew <u>H</u> elp
Show: <all></all>	🔁 Save and Close - 🔒 🗙 💼 @ 🔟 督 註: ? -
Phones	Org Name and Address
Phone number	Org Name: Org Name Org Id: Org Id Parent Corp: Parent Corp
System Record I	Constituent Code: Constituent Code No. subsidiaries: No.
i ∰ I Attributes ⊡ जिस्त्र All Addresses	No. employees: No. subsidiaries
Addressee/Salutation	employees Organization Matches Gifts?: Organization
🗐 🔟 Relationships	Address line 1: Address line 1 Gifts?
i ⊕Ran Notes I ⊕Ran Gifts	Address line 2: Address line 2
⊡ - III First Gift	City: City State: State ZIP: ZIP
庄 🔟 Last Gift 🚬 💌	
	Phone number: Phone number
da Find	Phone type: Phone type
Additional Objects	
E- III Standard Objects	
A Text Label	
- Rage	
Link to Custom View	
- B Saved Parts	
1	
1	
-	

18. Using the same selection methods in the steps above, drag and drop a second Text Label and Frame to the Custom View Designer screen. In addition, drag and drop contact and matching gift fields such as Is Contact?, Contact Type, Address, Position, Matching Factor, and Match Notes as seen on the following screen.

Note: Use the scroll bar to the right of the Custom View Designer screen to view all information on the screen.

Remember, when you select to drag and drop one-to-many field groups, a screen appears, asking you to select a group style. Your Custom View Designer screen should look similar to the one below.



**Warning**: You can save a custom view with a view format of individual, organization, or both. This determines the type of constituent record to which you can apply the custom view. For example, you can only apply custom views with an organization format to organization constituent records. If you choose to save a custom view with a view format of both, you can apply that custom view to both individual and organization records. For more information about information about saving a custom view, see "Saving a custom view" on page 64.

Once you finish adding the fields and objects you want to the Custom View Designer screen, you can establish properties, criteria, and grid design settings for the field groups you included. For more information about establishing these settings, see "Setting Properties, Criteria, Grid Design, and Format for a Custom View" on page 53.

19. To save the information entered in the custom view and close the Custom View Designer and Field screens, click **Save and Close** on the toolbar. You return to the Custom Views page. For more information about saving a custom view, see "Saving a Custom View" on page 63.

# Setting Properties, Criteria, Grid Design, and Format for a Custom View

**Note**: You can also establish properties for objects such as text labels, roll up links, and frames. You can establish properties for these objects the same way you establish properties for field groups.

Once you drag and drop the fields and objects to the Custom View Designer screen, you can establish properties, criteria, formatting, grid design, and formatting for them.

Each type of field group, whether it be one-to-one or one-to-many, can have properties. You can also set up properties for field groups in both grid and free-form layout. In addition, any type of object, such as a roll up link or frame, can have properties. Properties are basic settings, such as fonts, background colors, and border widths that you establish based on your needs. To establish properties for a field group or object, highlight the field group or object and click **Properties** on the toolbar of the Custom View Designer screen. When setting properties, you can view real-time examples of your selections using the viewing box at the bottom of the screen. For more information about the Field Group Properties screen, see "Field Group Properties Screen" on page 22.

You can establish criteria only for one-to-many field groups in either grid or free-form layout. Depending on the type of field group with which you are working, different criteria screens appear. Criteria screens are the screens you work with in the *Export* module. You export information based on the criteria you establish for export fields. With *Custom View*, the same criteria screens exist for any one-to-many field group you select to include on the Custom View Designer screen. The criteria you specify determines what type of data appears in a custom view. To establish criteria for a one-to-many field group, highlight the field group and click **Criteria** on the toolbar of the Custom View Designer screen. For more information about criteria settings, see "Criteria Settings" on page 31. For more information about criteria screens, see the *Query & Export Guide*.

You can only set grid design for one-to-many field groups in grid layout. When in grid design mode, you can resize and reorganize columns. When in grid design mode, the grid text appears in red. To establish grid design settings, highlight the grid and click **Edit** on the toolbar of the Custom View Designer screen. For more information about grid design settings, see "Edit in Grid Design" on page 32.

For fields such as dates and addressees, you can select formatting options. For example, when working with the **Birth date** field, you can set the date to appear in long or short date format. To set formatting options, highlight the field and click the **Format** button on the toolbar.

#### Setting properties for custom view field groups and objects

**Scenario:** You recently created a custom view containing name, address, contact, and matching gift information for an organization constituent. You now want to set properties for the **Org Name and Address** text label included in the custom view. Once you finish setting properties for the header, you want to set properties for other fields and objects as well. Open the custom view and set font, background, and edges properties for the fields and objects you want.

**Tip:** You can use shortcut keys to move around **The Raiser's Edge** without using your mouse. For example, highlight a field and press **ALT** + **E**, **P** on your keyboard to access the Field Group Properties screen.

 From an open custom view, on the Custom View Designer screen, highlight any field group or tool by clicking the field group or object once. For this example, highlight the **Org Name and Address** text label. For more information about accessing a custom view, see "Accessing a Custom View" on page 8.

Fields - Available Fields	Custom View Designer - Org Contact, MG     File Edit View Help
Show: <all></all>	🕒 Save and Close - 🔛 🗶 🗐 🔛 😭 🧱 ? -
⊕-     Biographical       ⊕-     Spouse       ⊕-     Galases       ⊕-     Credit Cards       ⊕-     Constituent Codes       ⊕-     Solicitor Goals       ⊕-     Primary Business information       ⊕-     Addressee/Salutation	Org Name and Address       Org ID: Org ID       Parent Corp: Parent Corp         Org Name:       Org ID: Org ID       Parent Corp: Parent Corp         Constituent Code:       Constituent Code       No. subsidiaries:         No. employees:       No. employees:       Organization Matches Gifts?:         Address:       Address:       Address:
Hardinesseer Saturation Hardinesseer Saturation Hardinesseer Saturation Hardinesseer Hardinesseer Hardinesseer Hardinesseer Hardinesseer Hardineseer H	Phone type: Phone type Phone number: Phone number Matching Gift Matching Gift Flag?: Matching Gift Flag? Match Notes: Match Notes Matching Factor: Matching Factor
Additional Objects  - III Standard Objects - A Text Label - III Image	Max Match Per Gift: Max Match Per Gift Min Match Per Gift: Min Match Per Gift Max Match Total: Max Match Total Min Match Total: Min Match Total Max Match Annual: Max Match Annual Min Match Annual: Min Match Annual
Frame     A Roll Up Link     Cast Link to Custom View     Saved Parts     Custom Parts	Contact Is Contact? Is Contact?

**Note:** When you highlight a field, the **Criteria**, **Edit**, and **Properties** buttons appear on the Custom View Designer screen. To establish properties, you can click the **Properties** button on the screen.

You can set properties for any one-to-one or one-to-many field group or object in a custom view. For example, you can set properties for fields, images, text labels, and frames.

A <u>4</u> Eont	Eont(s):	Times New Ro	oman'		▼.
🖄 <u>B</u> ackground	<u>S</u> ize	Custom	▼ 10 pt ▼	1	
🗄 <u>E</u> dges	Color:	Black			
	- Style:	Underline	 ☐ Stri <u>k</u> ethrough ☐ <u>B</u> old	□ <u>O</u> verline □ Bo <u>l</u> der	S <u>m</u> all Cap
	Alignment:	<not set=""></not>	<ul> <li><not set=""></not></li> </ul>	<b>T</b>	•
	Capitalization:	None			
	Indentation:	pt			
	Letter spacing:	Normal	• px •	1	
	Line spacing:	Normal	• px •	1	
	Text direction:	Left to right			
	Preview				
	Org Name a	nd Address	:		

2. On the toolbar, click **Properties**. The Field Group Properties screen appears.

- 3. To work with font and spacing for the text label, click **Font** on the left of the screen. Several selections appear on the right side of the screen.
- 4. In the **Fonts** field, select "Times New Roman". You want to specify a font for the text in the text label. To search for different fonts not currently listed in the **Fonts** field, click the ellipsis to access the Font Picker screen. From the Font Picker screen, you can select additional installed fonts.
- In the Size field, select "Custom". When you select Custom in the Size field, additional fields appear where you can specify a size not currently listed in the Size field. For this example, in the additional fields, enter "10" and select "pt".

Other examples of size selections include Medium and Small.

6. In the **Color** field, select "Black". You want the text in this text label to appear in black letters.

To search for different colors not currently listed in the **Color** field, click the ellipsis to access the Color Picker screen. From the Color Picker screen, you can select additional colors to apply to your field.

- 7. Select a **Style** to apply to the field with which you are working. The style options you can select include: Underline, Strikethrough, Overline, italic, Bold, Bolder, and Small Caps. To apply a style, mark the checkbox next to the style selection you want.
- 8. In the **Alignment** field, you can select an alignment. Examples of alignment are Left or Right. For this example, do not select anything.
- 9. In the **Capitalization** field, you can specify capitalization settings for the text label. For this example, do not select anything.
- 10. In the **Indentation** field, do not enter a number. You do not want to apply any indentation to the text label.

- 11. In the **Letter spacing** field, select "Normal". You want to apply normal letter spacing to the text label. When you select Custom in this field, additional fields appear so you can specify a custom spacing.
- 12. In the **Line spacing** field, select "Normal". You want to apply normal line spacing to the text label. When you select Custom in this field, additional fields appear so you can specify a custom spacing.
- 13. In the **Text direction** field, select "Left to right". You want text in the text label to read from left to right.
- 14. To work with background color and imaging for the text label, click **Background** on the left of the screen. Several selections appear on the right side of the screen.

A Font	Background color
Background	Color: White
🗄 <u>E</u> dges	Transparent
	Background image
	Image:
	Tiling: Do not tile
	Scrolling: Scrolling background
	Position
	Horizontal: Custom 🔽 🛛 🕺 🔽
	Vertical: Custom ▼ 0 % ▼
	Do not use background image
	Opacity
	Clear Solid
	Preview
	Org Name and Address

15. Under **Background color**, in the **Color** field, select "White". You want the background of the text label to appear in white.

To search for different colors not currently listed in the **Color** field, click the ellipsis to access the Color Picker screen. From the Color Picker screen, you can select additional colors to apply to your field.

- 16. To make the background color clear, mark the **Transparent** checkbox. For this example, you do not need to mark the checkbox.
- 17. Under **Background image**, you can set several properties for an image. For example, you can select the image to include in the background, tiling, and scrolling options for the image, and horizontal and vertical positioning of the image. For this example, mark the **Do not use background image** checkbox because you do not want to include an image.
- 18. To lighten the text in the text label, under **Opacity**, move the line within the opacity scale towards **Clear** or **Solid**, depending on the level of lightness or darkness you want to apply to the text.

Remember, the lighter you apply opacity to a background color or image, the easier it is to see the data or text on top of the background. You can select the level of opacity that a background image or color has by using the opacity scale. Opacity is the level of lightness or darkness that text, color, or an image has.

19. To work with border size and padding for the text label, click **Edges** on the left of the screen. Several selections appear on the right side of the screen.

Background	Side			2000000 0000000	Padding	
	All	5	Margin <b>px</b>	5	px	
	Тор	5	px	5	px	
	Bottom	5	рх	5	px	
	Left	5	рх	5	px	
	Right	5	рх	5	рх	
	Borders					
	Border		Style		Width	Color
	All	Soli	Solid Line Thin			Red
	Тор	Solid Line		Thin		Red
	Bottom	Solid	Line	Thin		Red
	Left	Solid Line		Thin		Red
	Right	Solid Line Thin				Red

 Under Margins and Padding, to set All sides of the text label to have a five-pixel margin, enter the number "5" in the first row of the first column under Margins. In the second row of the first column under Margins, select "px".

Margin settings depict how far away the text or image appears from the margin of the custom view. For this example, the higher the margin number, the farther away the text appears from the upper left corner of the viewing box.

21. Under Margins and Padding, to set All sides of the text label to have a five-pixel padding, enter the number "5" in the first row of the first column under Padding. In the second row of the first column under Padding, select "px".

Padding settings depict how far away the text or image appears from the border you select. For this example, the higher the padding number, the more room between the text in the text label and the border.

- 22. Under **Borders**, to set **All** sides of the text label to have a solid line, select "Solid Line" in the first row under the **Style** column.
- 23. Under **Borders**, to set **All** sides of the text label to have a thin width, select "Thin" in the first row under the **Width** column.
- 24. Under **Borders**, to set **All** sides of the text label to have a red border, select "Red" in the first row under the **Color** column.
- 25. Set properties for any other field or object included in the custom view.
- 26. To save property settings for the text label and any other fields or objects in the custom view, click **OK**. You return to the Custom View Designer screen.

### > Establishing criteria for custom view field groups

*Scenario:* You are creating a custom view and you want to establish criteria settings for the **Gifts** field group. Highlight the **Gifts** field group and establish criteria of gifts to include in your custom view.

**Tip:** You can use shortcut keys to move around **The Raiser's Edge** without using your mouse. For example, highlight a field and press **ALT** + **E**, **C** on your keyboard to access a Criteria screen.

 From an open custom view, on the Custom View Designer screen, highlight a one-to-many field group by clicking the field group once. The one-to-many field group can either be in grid or free-form layout. For this example, highlight the **Gifts** field group. For more information about grid and free-form layout, see "One-to-Many Field Groups" on page 15. For more information about accessing a custom view, see "Accessing a Custom View" on page 8.

<mark>≋ Custom Viev</mark> Eile <u>E</u> dit <u>V</u> iew	_	r						
Save and Clo	se 🗸 🔚 🕻	× 🔁 🦷	I 🔛 😭	8-8- 8-8- 8-8-				
Campaign	Fund	Appeal	Amount	Pay method	Receipt	Reference number	Reference date	Received?
	Drag	and drop	fields here	from the (	Gifts grou	ip to build a	grid.	
I							<b>F</b> 3	M 🗗

**Note**: When you highlight a one-to-many field group in grid or free-form layout, the **Criteria**, **Edit**, and **Properties** buttons appear on the Custom View Designer screen. To establish criteria, you can click the **Criteria** button on the screen.

2. Click Criteria on the toolbar. The Gifts Criteria screen appears.

Gifts Criteria	×
1: General 2: Filters 3: Gift Types	
For each Constituent, enter the number of Gifts Include Gifts with these Dates Date to use: Gift date Date: Include all dates	s to show: 4
Include Gifts for these Amounts Start amount: \$20.00 III End amount: \$500.00 III	Soft Credit Gifts To         O Donor         O Soft credit recipients         Use distribution on gift         Both
C Order Gifts By Date	Credit Matching Gifts To O Donor O MG Company O Both
ОК	Cancel

Depending on the type of field group with which you are working, different criteria screens appear. Criteria screens are the screens you work with in the *Export* module. You export information based on the criteria you establish for export fields. With *Custom View*, the same criteria screens exist for any one-to-many field group you select to include on the Custom View Designer screen. For a custom view, the criteria you specify determines what type of data appears in a custom view.

For this example, the **Gifts** one-to-many field group is highlighted, so you can establish gift criteria.

- 3. On the General tab in the **For each Constituent, enter the number of Gifts to show** field, enter "4". You want to show the first four gifts matching the criteria you specify on Gifts Criteria screen.
- 4. Under Include Gifts with these Dates, in the Date to use field, select "Gift date". You want to include gifts with gift dates.
- 5. Under Include Gifts with these Dates, in the Date field select "Include all dates". You want to include gifts with all dates.
- 6. Under Include Gifts for these Amounts, in the Start amount field, enter "\$20.00". You want to include gifts starting with the amount of \$20.00.
- 7. Under Include Gifts for these Amounts, in the End amount field, enter "\$500.00". You want to include gifts ending with the amount of \$500.00.
- 8. Under **Soft Credit Gifts To**, mark **Both**. You want to include gifts soft credited to both the donor and the soft credit recipient.
- 9. Select the Filters tab.

iifts Criteria		×
1: General 2: Filters 3: Gift Types	:]	
	fts may be filtered on the items showr	n in the Selected Filters column.
Filters	Include	Selected Filters
Campaigns	All	<all campaigns=""></all>
Funds	All	<all funds=""></all>
Appeals	All	<all appeals=""></all>
Query	All	<all criteria="" gifts="" meet="" that=""></all>
	OK Cancel	

10. On the Filters tab, do not select anything. You want to include all campaigns, funds, appeals, and queries.

11. Select the Gift Types tab.

Gifts Criteria	×
1: General 2: Filters 3: Gift Types	
Gift Types: All Cash Cash Cash Pay-Cash Recurring Gift Pay-Cash All Stock Stock/Property Stock/Property (Sold)	pes:
Exclude zero amount gifts     Use sale date for sold stock/property     Use sale amount for sold stock/property     Subtract broker fee from sold stock/property     Use gift balance instead of gift amount     Calculate gift balance based on date range, campaign, fund and appendic	al
OK Cancel	

- 12. On the Gift Types tab, in the **Gift Types** box, highlight **All Pledge** and click the single right arrow to move **All Pledge** to the **Include these Gift Types** box. You want to include only pledge gifts in your custom view.
- 13. To save criteria settings for the field group, click **OK**. You return to the Custom View Designer screen.

When you apply this custom view to a constituent record, only gifts with the specified criteria appear. For detailed information about other criteria screens, including the Gifts Criteria screen, see the *Query & Export Guide*.

> Setting grid design for a custom view field group

*Scenario:* You are creating a custom view, and you included the **Phones** field group in grid layout. You decide you want to resize the column format in the grid. Highlight the **Phones** field group and resize the columns in the grid.

**Tip:** You can use shortcut keys to move around **The Raiser's Edge** without using your mouse. For example, highlight a field group and press **ALT** + **E**, **E** on your keyboard to access grid design mode.

1. From an open custom view, on the Custom View Designer screen, highlight the **Phones** field group by clicking the grid once. The **Phones** field group is a one-to-many field group in Grid Layout. For more information about accessing a custom view, see "Accessing a Custom View" on page 8.

Custom View Des	igner				_ 🗆 ×
<u>F</u> ile <u>E</u> dit ⊻iew <u>H</u> el					
🎦 Save and Close 🕶	🖬 🗙 🖏 🔍 😭 🗄	? -			
•				-	<u> </u>
Import ID	Phone number	Phone type	System Record ID		
	ones Grid fields here from the Phone				
		<b>B</b>	<u>k</u> 5		

**Note**: When you highlight a grid, the **Criteria**, **Edit**, and **Properties** buttons appear on the Custom View Designer screen. To edit the grid, you can click the **Edit** button on the screen.

2. Click **Edit** on the toolbar. The grid immediately changes into grid design mode. The information in the grid appears in red.

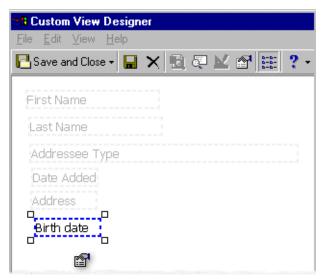


- 3. While in grid design mode, you can resize and reorganize columns. This may be useful when you want to reorganize columns after initially dragging and dropping the fields you want.
- 4. To return to Custom view mode, click anywhere outside the grid. Your changes are applied immediately.
- Formatting a field for a custom view

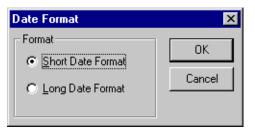
*Scenario:* You are creating a custom view, and you included the **Birth date** field. You want the field to appear in a short date format. Highlight the **Birth date** field and click the **Format** button to specify the date format.

**Tip:** You can use shortcut keys to move around **The Raiser's Edge** without using your mouse. For example, highlight a field group and press **ALT** + **E**, **F** on your keyboard to access a format screen.

1. From an open custom view, on the Custom View Designer screen, highlight the **Birth date** field. For more information about accessing a custom view, see "Accessing a Custom View" on page 8.



2. Click Format on the toolbar. The Date Format screen appears.



3. Select Short Date Format and click OK. You return to the Custom View Designer screen.

## Saving a Custom View

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

At any time, you can save a custom view to your database. Naming a custom view is as important as the design of the custom view itself. If you create many different types of custom views, do not use generic names. For example, it is easy enough to name the custom views you create with numbers, such as View 1 or View 2. If you choose this naming method, when you select the view you want to apply from the constituent record, you can only select from a list of custom view names. Therefore, names such as View 1 or View 2 are not helpful or intuitive. It is best to name your custom view in a way that is descriptive; a name you can easily recognize. Examples of possible names include Basic Biographical, Volunteer Data, or Membership/Gift.

Saving custom view parts is also a key element in using *Custom View*. The idea behind *Custom View* is to build a constituent record view that is useful and beneficial to your working needs. When you create custom views, you take saved parts of existing custom views to build new custom views and edit existing ones. Using this "building block" method helps you create useful views that serve a purpose. It also saves time because you can select from an extensive list of saved parts, such as text labels and roll up links.

#### Saving a custom view

1. From an open custom view, select **File**, **Save** from the menu bar. For more information about accessing a custom view, see "Accessing a Custom View" on page 8.

Fields	👷 Custom View Designer 📃 🗖 🗙
Available Fields	Eile Edit View Help
Show: <all></all>	** Mew Crit+N 見 (平) と (計) ::
Biographical     Biographical     Biographical     Gradue     Source     Gradue     Cradit Cards     Gradue     Constituent Codes     Gradue     Solicit     Gradue     Solicit     Gradue     Solicit     Gradue     Solicit     Gradue     Solicit     Solicit     Gradue     Solicit     Gradue     Solicit     So	Letete      Save Ctil-S Save as Ctil-A Save as Ctil-A Corg ID: Org ID Parent Corp: Parent Corp tuent Code No. subsidiaries; No. subsidiaries ployees Organization Matches Gifts?: Organization Matches Gifts? Address: Address
B - III Address B - III Addresse/Salutation B - III Relationships B - III Appeals B - IIII Notes B - IIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIIII	Phone type: Phone type Phone number: Phone number Matching Gift
Gifts     Gift     Inclusion     Gift     Marcological	Matching Gift Flag?: Matching Gift Flag? Match Notes: Match Notes Matching Factor: Matching Factor Max Match Per Gift: Max Match Per Gift Min Match Per Gift: Min Match Per Gift
Additional Objects	Max Match Total: Max Match Total Min Match Total: Min Match Total
Standard Objects      A Text Label      Image      Frame	Max Match Annual: Max Match Annual Min Match Annual: Min Match Annual
A Roll Up Link	Contact
	Is Contact?: Is Contact?

The Save Profile View screen appears.

Save Profile View							
View <u>n</u> ame:	Org Contact, MG	Save					
	Contains name, address, contact, and matching gift information for an organization record.	Cancel					
View <u>f</u> ormat:	Individual						
✓ Other users may use this view							
☑ Other users may modify this view							

- 2. In the View name field, enter a name for the custom view, such as "Org Contact, MG".
- 3. In the **Description** box, enter a description for the custom view, such as "Contains name, address, contact, and matching gift information for an organization record."
- 4. In the **View format** field, select to save the custom view as individual or organization.

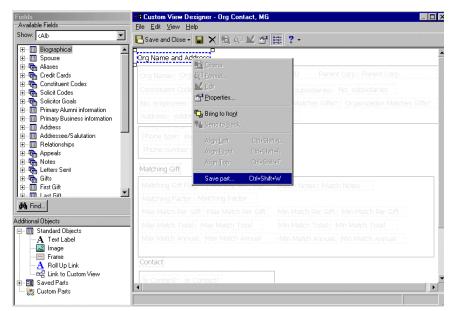
When you select "Individual" in this field and save the custom view, you can apply the custom view to individual records only. When you select "Organization" in this field and save the custom view, you can apply the custom view to organization records only. When you select "Both" in this field and save the custom view, you can apply the custom view to both types of records.

- 5. Mark the **Other users may use this view** checkbox. Marking this checkbox specifies that users other than yourself can view this particular view.
- 6. Mark the **Other users may modify this view** checkbox. Marking this checkbox specifies that users other than yourself can modify this particular view.
- 7. Click Save. You return to the Custom View Designer and Fields screens.

#### Saving part of a custom view

**Tip:** You can use shortcut keys to move around **The Raiser's Edge** without using your mouse. For example, highlight a field and press **CTRL** + **SHIFT** + **W** to save part of a custom view.

1. From an open custom view, highlight a part you want to use as a saved part. Examples of parts you want to save include text labels, roll up links, and images. For this example, highlight the **Org Name and Address** text label.



2. Right-click the text label and select **Save part** from the right-click menu. The Save screen appears.

Save	e 🗙					
Save part This option saves the selected element's definition. Saved parts may the re-used on other custom views, facillitating consistent interface designs while minimizing duplicated effort.						
Saved part name: Basic Bio Header						
	OK Cancel					

- 3. In the Saved part name field, enter a name for the saved part, such as "Basic Bio Header".
- 4. Click **OK**. You return to the Custom View Designer and Fields screens.

On the Fields screen in the Additional Objects box, the saved part now appears under Saved Parts.



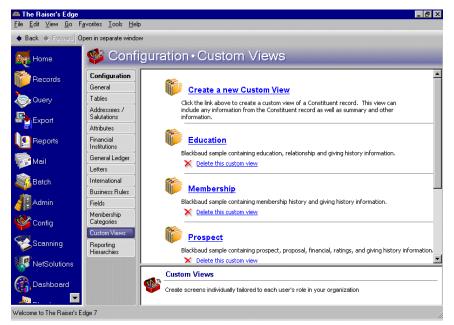
Building a custom view using saved parts

**Scenario:** Recently, you created several custom views containing useful fields and objects. When creating those custom views, you frequently saved parts. Now you have an extensive list of saved parts to use for new custom views. Today, you want to create a new custom view containing name and address information, as well as primary education and business information for a constituent. Using *Custom View*, create a new custom view to include basic biographical, business, and education fields for an individual constituent record. Use saved parts such as fields, text labels, and roll up links to create the custom view.

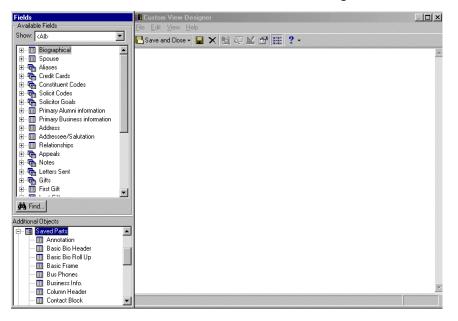
1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.



2. Click Custom Views. The Custom Views page appears.



3. Click Create a new Custom View. The Custom View Designer and Fields screens appear.



4. From the Fields screen, in the **Additional Objects** box, click the plus sign to the left of **Saved Parts**. A list of saved parts appears. You want to build this custom view using existing saved parts.

5. Under **Saved Parts**, highlight **Basic Bio Header** and drag and drop it to the Custom View Designer screen. You want to use this text label to identify groups of fields you include on the screen. To rename the text label, double-click the text label and enter a name, such as "Basic Bio".

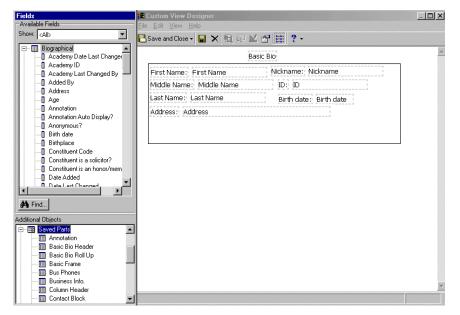
Fi	elds		🛱 Custom View Designer	
FA	vailable Fields		File Edit View Help	
S	how: <all></all>	-	🔁 Save and Close 🗸 🖳 🗶 🛃 🚰 🔛 🚰 🧱 📍 🔹	
	and a second sec	•		A
	E III Spouse		Basic Bio	land a
	🗉 📭 Aliases			
	🗄 🖷 Credit Cards			
	🗄 🖬 Constituent Codes			
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	🗄 🖬 Solicitor Goals			
	Imary Alumni information			
	Primary Business information			
	± Ⅲ Address ± Ⅲ Addressee/Salutation			
	± III Addressee/Salutation ± III Relationships			
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	The Notes			
	indes i∃ • ि Letters Sent			
	Eciles Joint			
	E First City			
	m Larca	•		
é	Find			
Ad	ditional Objects			
ΓĖ	- 🖼 Saved Parts			
	- III Annotation			
	🎹 Basic Bio Header	Kest		
	🏢 Basic Bio Roll Up			
	🎹 Basic Frame			
	🔠 Bus Phones			
	🔤 🛄 Business Info.			
	- 🛄 Column Header			
L		•		

You can position the text label anywhere on the Custom View Designer screen. For this example, the text label is positioned in the upper middle section of the screen.

6. Under **Saved Parts**, highlight **Basic Frame** and drag and drop it to the Custom View Designer screen. You want to use a frame to encompass basic name and address information.

You can position the frame anywhere on the Custom View Designer screen. For this example, the frame is positioned in the upper middle section of the screen.

7. From the Fields screen, in the **Available Fields** box, click the plus sign to the left of the **Biographical** field group. The list of fields related to the **Biographical** group appears.

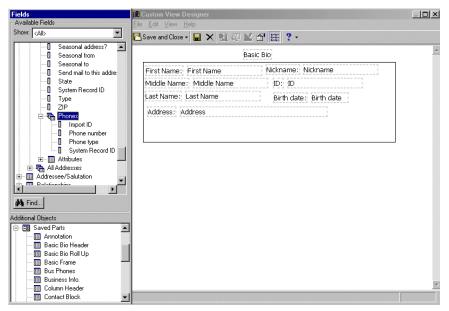


**Note**: To include a field label with a field, from the Fields screen press the **CTRL** key on your keyboard and highlight the field. Once you drag and drop the field onto the Custom View Designer screen, the field and its field label appear on the screen.

- 8. Highlight the **First Name** field and drag and drop it into the frame on the Custom View Designer screen. The **First Name** field now appears in the frame on the Custom View Designer screen.
- 9. Using the same selection method, drag and drop the following fields to the Custom View Designer screen: Middle Name, Last Name, Nickname, ID, Birth date, and Address.
- 10. In the **Available Fields** box, click the plus sign to the left of the **Address** field group. The list of fields related to the **Address** group appears.

**Note**: Once you drag and drop a field label and field to the Custom View Designer screen, press the **CTRL** key on your keyboard and click the field label and field name to highlight both. When you highlight both using this method, you can move both the field label and field name on the screen. This is helpful when you want to move both to maintain alignment.

- 11. Click the plus sign to the left of the Preferred Address group to reveal the Preferred Address field names.
- 12. In the **Available Fields** box, click the plus sign to the left of the **Phones** group to reveal the **Phones** field names.



13. Highlight the **Phones** field group and drag and drop it to the Custom View Designer screen. The Select Group Style screen appears.

Select Group Style					×
Group Style					
Select the format y	ou would like to us	e for displauing	multiple rows of d	ata	
		ic for displaying	malapic tores of d		
	Name	Address 1	City	State Zip	
	John Lennon	1 Maple St.	Mount Pleasant	SC 29466	
	George Harrison	1 Pine St.	Mount Pleasant	SC 29401	
Grid Layout	Paul McCartney Ringo Star	1 Flora Ln. 1 Maple St.	Charleston Framingham	SC 29402 MA 01760	
is and Layout	Kingo Star	1 maple Sc	Framingham	MA 01760	
	The second se				
	1				
	John Lennon				
	1 Maple St.				
	Mount Pleasant	SC 29466			
				1	
	George Harrison	1			
C Free Form	1 Maple St.				
Layout	Mount Pleasant	00.00466			
-	MUUTIL Pleasaril	SC 29400			
	Paul McCartney				
	1 Flora Ln.				
	Mount Pleasant	SC 29466			
		Contraction of the local division of the loc			
				OK	Cancel
					Cancel

The Select Group Style screen appears because you selected to drag and drop a one-to-many field group. Any time you select a one-to-many field group, a screen appears asking you to select to view the field group in **Grid Layout** or **Grid Layout**. For more information about one-to-many field groups, see "One-to-Many Field Groups" on page 15.

14. Select **Grid Layout**. You want to view the **Phones** field group as a grid. The **Phones** field group now appears on the Custom View Designer screen.

Fields Available Fields	R Custom View Designer File Edit View Help	_ 🗆 ×
Show: All>	🎦 Save and Close - 🔒 🗙 🗟 💷 🖆 🔠 ? -	
Seasonal address?	Basic Bio	*
Seasonal to     Send mail to this addre:     State	First Name: First Name Nickname: Nickname Middle Name: Middle Name ID: ID	]
System Record ID     Type     ZIP     Frones     Import ID     Prone number	Middle Name: Middle Name ID: ID Last Name: Last Name Birth date: Birth date Address: Address	
Phone type System Record ID  Control Attributes  Attributes  Attributes  Control Attributes  Attribut	Phone type Phone number Phones Grid Block Drag and drop fields here from the Phones group to build a grid.	L
Additional Objects  Additional Objects  Annotation  Basic Bio Header  Basic Bio Roll Up  Basic Frame Bus Phones  Bus Phones  Column Header  Contact Block		

15. In the **Available Fields** box, under the **Phones** field group, highlight the **Phone number** and **Phone type** fields and drag and drop them to the Phones block.

- 16. In the **Additional Objects** box, under **Saved Parts**, highlight **Extra Info Image** and drag and drop it to the Custom View Designer screen. You want to use this image next to a roll up link to identify that more constituent information exists in the roll up link.
- 17. In the **Additional Objects** box, under **Saved Parts**, highlight **Basic Bio Roll Up** and drag and drop it to the Custom View Designer screen next to the image. You want to use this roll up link to identify that more constituent information exists.

Fields Available Fields	Fill Custom View Designer File Edit View Help	<u>_   ×</u>
Show: <all></all>	🔁 Save and Close - 🔒 🗙 🛍 🐖 🔛 🔂 🏢 ? -	
Biographical     Academy Date Last Chang     Academy ID	Basic Bio	
Academy Last Changed By Added By	First Name : First Name Nickname : Nickname : Middle Name : Middle Name : JD : JD	
Address Age Annotation	Last Name Birth date; Birth date	
Annotation Auto Display? Anorymous? Birth date Constituent E a solicitor? Constituent is a solicitor? Date Added Date Added	Phone type Phone number Phones Ghid Block Drag and drop fields here from the Phones group to build a grid.	
Additional Objects       Additional Objects       Image: Saved Parts       Image: S	Religion: Religion Maiden name: Maiden name	
Contact Block	Click to expand/contract	

- 18. Using the same drag and drop method, add additional biographical-related fields such as Age, Religion, and Maiden name inside the roll up link.
- 19. Using the same selection methods in the steps above, drag and drop another **Text Label** and **Frame** to the Custom View Designer screen. In addition, drag and drop primary business-related fields such as **Org Name**, **Industry**, and **Position** as seen on the following screen.

Note: Use the scroll bar to the right of the Custom View Designer screen to view all information on the screen.

Remember when you select to drag and drop one-to-many field groups, a screen appears, asking you to select a group style. Your Custom View Designer screen should look similar to the following screen.

Fields	🔀 Custom View Designer	
Available Fields	T <u>E</u> ile <u>E</u> dit <u>V</u> iew <u>H</u> elp	
Show: <all></all>	🔁 Save and Close - 🔒 🗙 🖻 ሞ 🔛 🚰 🏢 ? -	
🖅 🕞 Credit Cards 🔺	P=====q	
E Constituent Codes	Basic Bio	
E	First Name: First Name Nickname: Nickname	
Primary Alumni information		
Primary Business information	Middle Name: Middle Name ID: ID	
Added By	Last Name: Last Name Birth date: Birth date	
Contact Type	Address: Address	
Date Added	Address, Address	
Date From		
Date Last Changed		
Date To DoNot Mail?	Phone type Phone number	
Fiscal year starts		
Hon Mem Acknowledge?	Phones Grid Block	
Hon Mem Contact	Drag and drop fields here from the <b>Phones</b> group to build a grid.	
	gru	
🙀 Find	protocology (Construction)	
Additional Objects	Business	
Standard Objects	Org Name: Org Name Industry: Industry	
A Text Label	Position: Position Income: Income	
Image		
Frame	Address: Address Is Primary?: Is Primary?	
A Roll Up Link		
Link to Custom View		-
Saved Parts	4	•
Basic Bio Header		

20. Using the same selection methods in the steps above, drag and drop another **Text Label** and **Frame** to the Custom View Designer screen. In addition, drag and drop primary education-related fields such as **School name**, **Campus**, and **Degree** as seen on the following screen.

Remember when you select to drag and drop one-to-many field groups, a screen appears asking you to select a group style. Your Custom View Designer screen should look similar to the following screen.

Fields Available Fields	A Custom View Designer File Edit View Help	<u>_0×</u>
Show: <all></all>	🔁 Save and Close - 🔛 🗙 🗟 🐖 🔟 😭 🏥 ? -	
Solicitor Goals     Primary Aturni Information     Added By     Aumni Info?     Campus     Date Added     Date Added	Phone type Phone number Phone structure Phone Schid Block Drag and drop fields here from the Phones group to build a grid.	-
Date graduated     Date Last Changed     Date left     Degree     GPA     GPA     Import ID     Known name     Last Changed Bu	Business Org Name: Org Name Industry: Industry Position: Position Income: Income Address: Address Is Primary?: Is Primary? Education	
🐴 Find	School name: School name Class of: Class of	
Additional Objects → Standard Objects → A Text Label → Frame → Roll Up Link → C Buil Up Link → C Link to Custom View → Saved Parts → Monotation	Campus: Campus Date entered: Date entered Degree: Degree Date graduated: Date graduated Frat/Sorority: Frat/Sorority Known name: Known name	
Additional Objects  A Text Label  Frame  A Roll Up Link  C Link to Custom View  C S seved Parts	School name:     School name     Class of:     Class of       Campus:     Campus     Date entered:     Date entered       Degree:     Degree     Date graduated:     Date graduated       Frat/Sorority:     Frat/Sorority:     Frat/Sorority:     Frat/Sorority:	<u>•</u>

Once you finish adding the fields and objects you want to the Custom View Designer screen, you can establish properties, criteria, and grid design settings for the field groups you included. For more information about establishing these settings, see "Setting Properties, Criteria, Grid Design, and Format for a Custom View" on page 53.

21. To save the information entered in the custom view and close the Custom View Designer and Field screens, click **Save and Close** on the toolbar. You return to the Custom Views page. For more information about saving a custom view, see "Saving a Custom View" on page 63.

# Applying a Custom View

You can easily apply custom views to individual and organization records in your database. When you view a constituent record without an applied custom view, you are in Edit mode, or normal viewing mode. When you decide to apply a custom view, you are in Custom view mode. You can easily switch back and forth between the two.

The custom views you apply are view-only and do not alter or change the data in the constituent record. To apply a custom view to a constituent record, click the **Run Custom View** button on the toolbar of a constituent record. A list of custom views appears so you can select the type of view you want to apply. Once you apply a custom view, the constituent record immediately changes to the view you select. The custom view appears in a Microsoft *Internet Explorer 6* window, and information in the view cannot be edited or changed. The title bar of the constituent record reflects which custom view you apply.

Each time you apply a custom view to a constituent record, any subsequent records opened also have the same view applied to the record. This is because *Custom View* remembers the last view you applied to a record. For example, if you open Max Taylor's constituent record and apply the Biographical custom view, each record opened thereafter has the same view. Even when you close *The Raiser's Edge*, *Custom View* remembers the last view applied. The last view applied can also be Edit mode view. Edit mode view is simply the constituent record in a normal view, without an applied custom view. For more information about constituent records, see the *Constituent Data Entry Guide*.

#### Applying a custom view

1. From a constituent record, click **Run Custom View** on the toolbar. A list of custom views appear. For more information about accessing a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.

le Edit View Constituent Letter Favorites Tools Help         Save and Close -       Image: Constituent Letter Favorites Tools Help         Save and Close -       Image: Constituent Letter Favorites Tools Help         Attributes       Media       Actions       Image: Constituent Letter Favorites Tools Help         Attributes       Media       Actions       Image: Constituent Letter Favorites Tools       Volunteer       Image: Constituent Prospect         Bio1       Image: Bio2       Addresses       Addressees/Salutations       Relationships       Agpr         Bio1       Image: Constituent Prospect       Image: Constituent Prospect       Image: Constituent Prospect       Image: Constituent Prospect         Bio1       Image: Constituent Prospect       Addressees/Salutations       Relationships       Agpr         Bio1       Image: Constituent Prospect       Aliages       Image: Constituent Prospect       Constituent Prospect         Bio1       Image: Constituent Prospect       Aliages       Image: Constituent Prospect       Constituent Prospect         Bio1       Image: Constituent Prospect       Image: Constituent Prospect       Constituent Prospect       Constituent Prospect         Last name:       Gerome       Image: Constituent Prospect       Image: Constituent Prospect       City: Pittsburgh         State:       PA <th>✓ Members &lt;= <edit mode<="" p=""></edit></th>	✓ Members <= <edit mode<="" p=""></edit>
Attributes Media Actions Honor/Memorial Volunteer Prospect     Biographical     Last name: Taylor     Middle name: Gerome     Titles: Mr.     V	Members <edit mode<br="">eals N Education Membershi Prospect Standard</edit>
✔ Bio 1     ✔ Bio 2     ✔ Addresses     ✔ Addresses/Salutations     ✔ Relationships     ✔ Agpression       Biographical     Preferred Address - Home     Country: United States       First name:     Max     Address ines:     3327 Dawson Street       Middle name:     Gerome     City:     Pittsburgh       Titles:     Mr.     ✔     ✔	eals <u>N</u> Education Membershi Prospect Standard
Last name: Taylor Aliages Country: United States First name: Max Middle name: Gerome Titles: Mr.	Prospect Standard
First name:     Max       Middle name:     Gerome       Titles:     Mr.         City:     Pittsburgh	Standard
Middle name: Gerome Titles: Mr.  City: Pittsburgh	
Titles: Mr. City: Pittsburgh	1 Order NO OF
Suffixes: 🗸 🗸 State: PA 🔻 Pennsylvania	
Nickname: ZIP: 15208	DPC:
Type Number	/E-mail Address
ID: 77 Home 403-555-4579	
Gender: Male SSN: 229-13-4356	
Bith date: 07/05/1940 🔲 Age: 63	
Deceased? Date:	
Marital status: Married	
Spouse Michelle Taylor Gives anonymously	✓ Is a solicitor ✓Deta ✓ Has no valid addresses
Solicit code:	L mas no valio audiesses
arandparent (04/04/2001 - ); Alumnus (06/01/1962 - )	✓Business Bank

2. Select a custom view by clicking once on the name of the custom view you want to apply. The custom view is immediately applied to the constituent record. You are now in Custom view mode.

Save and Clos		• 👌 • 🕲 • 🚺 •	I 🕨 M 🔿 🥐 🏷 🖸	💿 🚭 📼 🥐 😹 · 🖻
Mr. Max	G. Taylo	r	Nickname:	
Mrs. Michelle	Taylor		Nickname: Shelly	
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	AL	<b>since</b> 06/01/1962		
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From Custom view mode for a constituent record, you can run various functions, such as creating new letters or running summaries. You cannot, however, alter or change information in the fields of a constituent record. From Custom view mode, you can also preview or print a custom view.

3. After you finish viewing the record, click Save and Close on the toolbar.

# Editing a Custom View

**Warning**: With *Custom View*, you cannot alter or change data on a constituent record. Any custom view you create is view-only.

With *Custom View*, you can easily add, change, and delete information in a custom view. Once you begin building custom views, you may find that your needs change. You may need to rearrange fields for a view, add fields, or delete fields not as necessary as you initially thought. From the Custom Views page, you can easily open a custom view and make the changes you need. Any information you need to change or add to the constituent record itself, must be done while you are viewing the constituent record in Edit mode (normal viewing mode).

#### Editing a custom view

**Scenario:** You created a custom view called "Basic Bio, Vol Contact", containing basic biographical and volunteer information for a constituent. After applying this view to constituent records in your database, you realize you need to add additional, important biographical fields to the custom view. Open the custom view and add the additional fields you need. This scenario uses the custom view set up in "Creating a custom view for an individual record" on page 42.

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

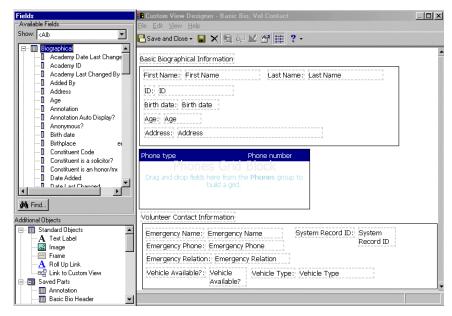


2. Click Custom Views. The Custom Views page appears.

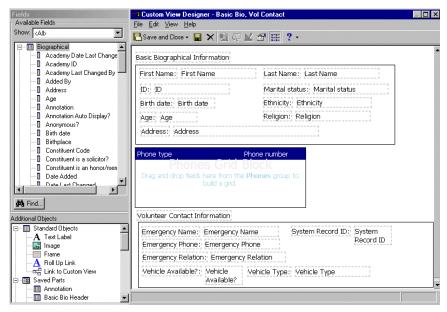


**Note**: To include a field label with a field, from the Fields screen press the **CTRL** key on your keyboard and highlight the field. Once you drag and drop the field onto the Custom View Designer screen, the field and its field label appear on the screen.

3. Click **Basic Bio**, **Vol Contact**. You want to open the custom view so you can add additional fields. The Basic Bio, Vol Contact custom view appears.



4. From the Fields screen, in the **Available Fields** box, click the plus sign to the left of the **Biographical** field group. The list of fields related to the **Biographical** group appear.



- 5. Highlight the **Marital status** field and drag and drop it into the frame on the Custom View Designer screen. The **Marital status** field now appears in the frame on the Custom View Designer screen.
- 6. Using the same selection method, drag and drop the **Ethnicity** and **Religion** fields to the Custom View Designer screen.

Make any additional changes to the custom view.

7. To save the information entered in the custom view and close the Custom View Designer and Field screens, click **Save and Close** on the toolbar. You return to the Custom Views page.

# **Previewing A Custom View**

At any time, you can select to preview a custom view. To preview a custom view, you must first apply a custom view to a constituent record. Once you apply a custom view, you can preview or print the custom view. You may find previewing a custom view useful before printing. For example, if you are unsure that the custom view contains all the information you need, you can preview the custom view to see an overall preview of how the custom view looks. When you preview a custom view, the information on the screen appears smaller so you can see the entire screen. To preview a custom view, select **File**, **Preview**, **Custom view** from the menu bar of a constituent record. Remember, to preview a custom view, the custom view must first be applied to the constituent record.

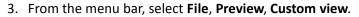
#### Previewing a custom view

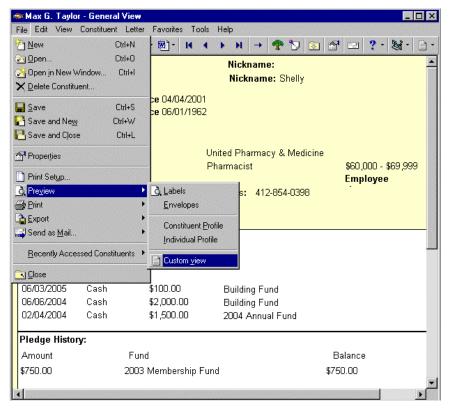
1. From a constituent record, click **Run Custom View** on the toolbar. A list of custom views appear. For more information about accessing a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.

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Maiden name:		Phones/E-mail/Links
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Gender:	Male SSN: 229-13-4356	
Birth date:	07/05/1940 🛅 Age: 63	
	Deceased? Date:	
Marital status:	Married	This constituent
Spouse	Michelle Taylor	□ Is inactive □ Is a solicitor
Solicit code:		Requests no e-mail

2. Select a custom view by clicking once on the name of the custom view you want to apply. The custom view is immediately applied to the constituent record. You are now in Custom view mode. For more information about applying a custom view, see "Applying a Custom View" on page 73.

**Note:** You can also preview a custom view by clicking **Preview** on the toolbar of an applied custom view. A list of preview options appears. In the list of options that appear, select **Custom view**.





The Print Preview screen appears, showing the custom view in preview format.

Print Preview					2
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The Print Preview screen appears in a Microsoft *Internet Explorer 6* window. You can use the scrolling bar to the right to scroll the preview, and you can also use the zoom and print functionality on the toolbar. For more information about printing a custom view, see "Printing a Custom View" on page 80.

4. To close the Print Preview screen, click **Close** on the toolbar. You return to the custom view for a constituent record.

# Printing a Custom View

At any time, you can select to print a custom view. You may find it useful to preview a custom view before printing to make sure all the information you want is included in the custom view. For more information about previewing a custom view, see "Previewing A Custom View" on page 77.

When you print a custom view, the information in the custom view is arranged in a print-friendly fashion. Do not worry about including too much information for a custom view. The custom view prints in pages, according to the amount of information included in a custom view. Page numbers appear in the top right corner of each printed page. To print a custom view, select **File**, **Print**, **Custom view** from the menu bar of a constituent record. Remember, to print a custom view, the custom view must first be applied to the constituent record.

#### Printing a custom view screen

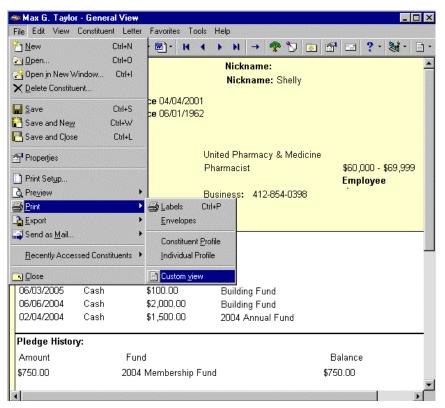
1. From a constituent record, click the **Run Custom View** button on the toolbar. A list of custom views appear. For more information about accessing a constituent record, see the Introduction to Constituent Records chapter of the *Constituent Data Entry Guide*.

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	07/05/1940 📧 Age: 63	
	Deceased? Date:	
Marital status:	Married	This constituent
Spouse	Michelle Taylor	Gives anonymously Has no valid addresses
Solicit code:		Requests no e-mail
Grandparent (0	4/04/2001 - ); Alumnus (06/01/1962 - )	✓Education ✓Business Bank

**Note:** You can also print a custom view by clicking **Print** on the toolbar of an applied custom view. A list of print options appears. In the list of options that appear, select **Custom view**.

2. Select a custom view by clicking once on the name of the custom view you want to apply. The custom view is immediately applied to the constituent record. You are now in Custom view mode. For more information about applying a custom view, see "Applying a Custom View" on page 73.

3. From the menu bar, select File, Print, Custom view.



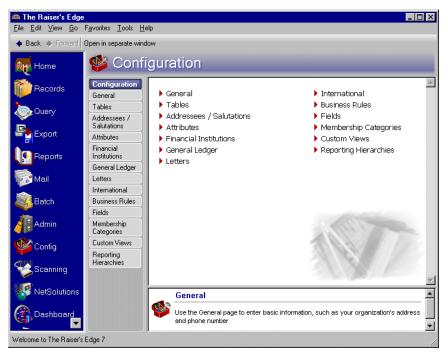
The custom view prints to the printer you select. Once you print a custom view, you return to the constituent record with the applied custom view.

# **Deleting a Custom View**

On occasion, you may want to delete a custom view from your database. Remember, any custom view you create is view-only. You cannot alter the data entered on constituent records in your database. With *Custom View*, you create different types of views for a record, but you cannot change or delete any constituent record information from within a custom view. Any changes you need to make to a constituent record must be done on the constituent record while in Edit mode (normal viewing mode). Therefore, when you delete a custom view, you are not deleting any information on a constituent record; you are only deleting the view you created.

#### Deleting a custom view

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



2. Click **Custom Views**. The Custom Views page appears.



**Note:** You can also delete a custom view by selecting **File**, **Delete** from the menu bar of an open custom view, or by clicking **Delete** on a custom view toolbar.

3. Under **Basic Bio and Volunteer**, click **Delete this custom view**. You want to delete the Basic Bio and Volunteer custom view. A message appears, asking if you are sure you want to delete the custom view.



4. To permanently delete the custom view, click **Yes**. To return to the Custom Views page without deleting the custom view, click **No**.

# **Other Custom View Options**

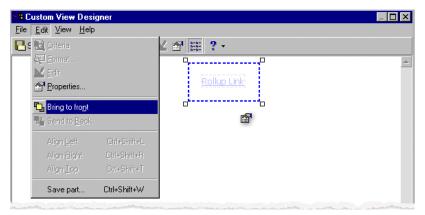
In addition to creating and working with custom views, you can also use other options not accessed through the Field Group Properties screen. The **Bring to Front**, **Send to Back**, and **Aligning** menu options are available from the menu bar of an open custom view. These additional options can help you better organize information on the Custom View Designer screen.

## Bring to Front, Send to Back

When you work with custom views, you are using several objects such as frames, roll up links, and text labels that enable you to design your own view of a constituent record. This functionality, in itself, is a bit different than most **Raiser's Edge** functionality. Because of this, it may take a few tries to understand how custom view objects work. For example, if you work inside a frame and you drag and drop one-to-many fields, roll up links, and text labels inside of that frame, you now have several layers of information making up the frame. At times, especially when you are defining properties and criteria for information in the frame, some layers may become overlapped. It is important you understand that this may occur.

You can easily use the **Bring to front** and **Send to Back** menu options to bring information forward on the screen, or to send information back behind other information on a screen.

- Bringing a field to front
  - 1. From the Custom View Designer screen of an open custom view, highlight a frame by clicking the frame once. For more information about opening a custom view, see "Accessing a Custom View" on page 8.



2. From the menu bar, select **Edit**, **Bring to front**. The frame is immediately brought to the front and appears on top of the information included in the frame. In this example, the frame appears on top of the roll up link.

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#### Sending a field to back

1. From the Custom View Designer screen of an open custom view, highlight a frame by clicking the frame once. For more information about opening a custom view, see "Accessing a Custom View" on page 8.

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2. From the menu bar, select **Edit**, **Send to Back**. The frame is immediately sent to the back and the information included in the frame appears in the frame. In this example, a roll up link appears in the frame.

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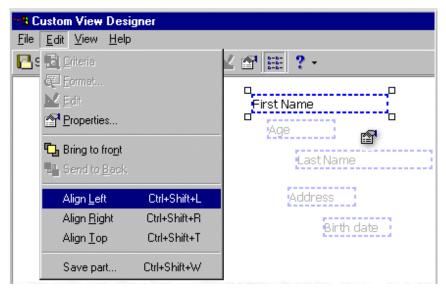
#### Aligning

**Note:** You can also align multiple fields by highlighting the fields and right-clicking on the Custom View Designer screen. From the right-click menu, select the type of alignment you want to apply.

You can use the aligning options to ensure that your fields are lined correctly with each other. For example, when you have three fields on the Custom View Designer screen, and you want to align them with the left most field. You can highlight the three fields by clicking the first field once. Click the **CTRL** key on your keyboard and highlight the other two fields. Once the fields are highlighted, you can use the alignment options available from the **Edit** menu of the Custom View Designer screen. You can only align multiple fields from the Custom View Designer screen. To align one field at a time, use the Field Group Properties screen.

#### Using alignment options for a custom view

1. From the Custom View Designer screen of an open custom view, highlight the various fields you want to align and select **Edit**, **Align** from the menu bar.



2. Select the type of alignment you want to apply. You can align left, right, and top. Once you make your selection, the alignment is applied immediately.

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