The Raiser's Edge™

The Raiser's Edge & Microsoft Office
Integration Guide

Contents

What Is In This Guide?

In *The Raiser's Edge & Microsoft Integration Guide*, you can learn about integrating **The Raiser's Edge** with Microsoft *Outlook*, *Word*, and *PivotTables*. With these features, you can simplify mail merges using *Word*, and create versatile Pivot Reports. You can also synchronize **Raiser's Edge** records with *Outlook* contacts, appointments, and tasks. You can also learn about the following.

- "Create a conditional mail merge in Mail" on page 70
- "Create a new acknowledgement letter from the gift record" on page 114
- "Formatting With the PivotTable Property Toolbox" on page 151
- "Using Totals in a Pivot Report" on page 153
- "Manually Installing or Removing the Outlook Integration COM Add-In" on page 172
- "Linking Outlook contacts to new Raiser's Edge constituents" on page 195

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.

Introduction to Microsoft Office Integration

Office Integration is designed to tightly integrate *The Raiser's Edge* with Microsoft *Office 2000*, *XP*, *2003*, *2007*, and *2010*. Although this integration in some cases replaces existing *Raiser's Edge* features with enhanced functionality, the Office Integration does not mean that *The Raiser's Edge* requires Microsoft *Office*.

> **Warning:** If you use *2007*, you must download Collaboration Data Objects, version 1.2.1, from www.microsoft.com to be completely compatible with *The Raiser's Edge*.

To use the Microsoft *Office* integration features through a terminal session, *Office* must be installed on the Terminal or Citrix Server and published out to users.

The Raiser's Edge integrates with *Office* in three main areas: integration with *Word* for creating simple and conditional mail merges; integration with *Excel PivotTables* to create customizable Pivot Reports; and integration with *Outlook* to enable synchronizing contacts, appointments, and tasks with *Raiser's Edge* records.

Word Integration

You can create mail merges to retrieve specific information from your database and use the information with a Microsoft *Word* document to create custom letters for your constituents. *The Raiser's Edge* is designed with *Word* integration to take you seamlessly through the process of creating the data file in *The Raiser's Edge*, creating the documents in *Word*, and automatically processing the mail merge to create your custom letters. This integrated process is done in just a few time-saving steps and eliminates the risk of missing any steps as you create a mail merge. For more information, see "Mail Merge With Microsoft Word" on page 3.

Pivot Reports (Excel Integration)

Excel PivotTables in pivot reports are unique tools you can use to create custom views of your information by dragging and dropping information previously gathered using a query. With these interactive reports, you can analyze data and create summaries and reports.

A pivot report is the product of using an interactive *PivotTable* to summarize, organize, and calculate your *Raiser's Edge* data. With a pivot report, you get a multi-dimensional view of information you choose to include. You can rotate the rows and columns of a pivot report to see different summaries of your data, filter your data by displaying different pages, or display the details for specific areas of interest. By using a pivot report, you have unprecedented flexibility in creating a report that presents information from your database not included in a standard report. For more information, see "Pivot Reports" on page 123.

Outlook Integration

The Raiser's Edge can integrate constituent, action, appeal, and (when you have the optional module *Event Management*) event records with your Microsoft *Outlook* contact, calendar, and task records. You can synchronize the two programs so that records from one program are linked to existing or new records in the other program. Once records are linked, when you modify the record in one program, the record is automatically updated in the other whenever you synchronize the programs.

When you integrate the two programs, constituents you add to *The Raiser's Edge* can be automatically included in *Outlook* as contacts. Additionally, actions, appeals and events you establish in *The Raiser's Edge* can appear as calendar and task records in *Outlook*. You can also select *Outlook* contact, calendar, and task records and link them to new or existing records in *The Raiser's Edge*. For more information, see "Microsoft Outlook Integration" on page 165.

Mail Merge With Microsoft Word

Procedures

If you have a version of Microsoft *Word* prior to *Word 2000*, you can see the integration options, but you cannot perform an integrated mail merge using *The Raiser's Edge*. To take full advantage of the enhanced features, you must have *Word 2000*, *XP*, *2003*, *2007,* or *2010* installed on your computer. To use the integration features through a terminal session, *Office* must be installed on the Terminal or Citrix Server and published out to users

Warning: If you use *2007*, you must download Collaboration Data Objects, version 1.2.1, from www.microsoft.com to be completely compatible with *The Raiser's Edge*.

You can create mail merges to retrieve specific information from your database and use the information with a Microsoft *Word* document to create custom letters for your constituents. *The Raiser's Edge Enterprise* is designed with *Word* integration to take you seamlessly through the process of creating the data file in *The Raiser's Edge*, creating the documents in *Word*, and automatically processing the mail merge to create your custom letters. This integrated process is done in just a few time-saving steps and eliminates the risk of missing any steps as you create a mail merge.

This chapter guides you through linking *Raiser's Edge* data files with all the *Word* documents you need for both simple and conditional mail merges in *The Raiser's Edge*. If you have existing simple mail merge data files and form letters, you can continue to use the files using the old process. However, we recommend the next time you need to create a new simple or conditional mail merge, take advantage of the quick steps within *The Raiser's Edge* to easily automate your mail merge. Every step of the old process (which can be complicated) is included when you select the Blackbaud Simple Word Merge export format or the Blackbaud Conditional Word Merge export format in *Export* and the Microsoft Word Mail Merge Wizard in *Mail*.

Frequently Used Terms

To use Word Integration in *Export* and *Mail* correctly, you must have a basic understanding of the different terms used in both parts of *The Raiser's Edge*. If you come across an unfamiliar term when reading this or any chapter in *The Raiser's Edge* documentation, make sure you check the online glossary in the help file.

Available Fields to Export. The **Available Fields to Export** box contains a list of all the fields and their parent groups you can use in your export. The fields you can export are based on the type of export you are creating and other filtering criteria established in the export record. Fields for each export type are listed in categories of information, which can be expanded to reveal all the fields that fall under each category.

Blackbaud Conditional Word Merge. Use this export format to create conditional mail merges using Microsoft *Word* and *The Raiser's Edge*. When you select this export format, the Blackbaud Conditional Word Merge Wizard appears. The wizard helps you select the information you need to create an entire conditional mail merge, automating the process for you. This includes selecting the conditional field for the mask document and writing each individual letter to be used in the conditional mail merge.

Blackbaud Simple Word Merge. Use this export format to create simple mail merge documents using Microsoft *Word* and *The Raiser's Edge*. When you select this export format, an **Edit merge document** button appears on the toolbar. Click **Edit merge document** to open *Word* and create your simple mail merge document. When you export the information, your letters generate automatically.

Conditional mail merge. A conditional mail merge combines one data file (exported from *The Raiser's Edge*) and a series of form letters (created in *Word*). In addition, a conditional mail merge also contains a mask document (also created in *Word*). The mask document contains the conditional statements used to select the form letter the record in the data file receives.

For example, you are sending letters to every donor who has given to the Playground Site fund or the 2002 Annual Fund to encourage them to donate again. For your conditional mail merge, you will have the data file containing **The Raiser's Edge** fields you need for your letter. You need two form letters— one for those who donated to the Playground Site fund (Letter A) and one for those who donated to the 2002 Annual Fund (Letter B). Lastly, you need a mask document containing the conditional statement that if a donor gave to the Playground Site fund, he receives Letter A or if a donor gave to the 2002 Annual Fund, he receives Letter B. When the task is complete, a personalized letter for your constituents is created in an efficient, time-saving manner.

Control report. This is a report summarizing the characteristics of an export. A control report provides detailed information about an export, including an export's data file name and the data file location. This report also displays the multiple fields selected and how many records of information are in the export. We also recommend you print a control report before deleting any export files to keep a record of all export records for historic purposes.

Criteria group. A criteria group is defined as a set of related fields from the same record type. For example, the biographical group contains all the fields found on the main constituent record. There are two types of criteria groups in export: One-to-One groups and One-to-Many groups. One-to-One and One-to-Many groups illustrate the relationship between groups of fields. For example, the spouse group has a one-to-one relationship with the biographical group because each constituent can only have one spouse. The gifts group has a one-to-many relationship with the biographical group because each constituent can have many gifts.

Data file. The data file is the file containing the actual information extracted from your database. For example, if your output fields are **First Name** and **Last Name**, your data file contains all the first and last names found in your database (John Doe, Mary Smith, etc.).

Export. An export sends selected information from your database to another software application. When you export information, it is very much like packing for a vacation. You select the items you want to take (output fields) and put them in your suitcase (data file) and take your suitcase to your final destination (another software application).

> **Note**: Export formats are especially important if you are extracting information to send to a mailing house for address updating and verification, because formats can vary, and each mailing house requires a specific data format. For more information contact your mailing house.

Export format. An export format determines the way the data extracted from your database appears and with which software application it is used. Some export formats include Microsoft *Excel*, Microsoft *Access*, and *Lotus 1-2-3*.

Export record. An export record contains all the output fields selected for your export. This record also stores information regarding the filters and formatting options selected for certain output fields. If you export certain information on a regular basis, you can use the same saved export record to run multiple exports.

Export styles. An export style is how data in the data file is presented. In **The Raiser's Edge** you can create two export styles. The flat style is one-row-per-record and suitable for mail merges or easy reporting. The relational style has separate record types in separate tables.

Form letter. A form letter is a *Word* document containing the text you want to repeat in each letter.

Mask document. The document in *Word* that contains conditional statements used in a conditional mail merge. The conditional statements determine the letter each record in the data file receives.

Mail task. A mail task is the location for all fields, options, and checkboxes specific to a particular mailing process, such as printing labels or appeal cards. The fields, options, and checkboxes for a mail task are arranged on tabs so you can access all the information quickly and easily.

Output field. An output field is a field you want to include in your export. These fields correspond to fields found in **The Raiser's Edge**. For example, if you want to export the names of all constituents in your database, one of your output fields will be **Name**.

Parameter file. A parameter file contains all the settings, or parameters, you select for a particular mail task. For example, if you create envelopes for your Annual Mailing appeal, you can save the settings you select in the Envelopes mail task as a parameter file. Later, you can open this parameter file and rerun the mailing or alter the settings as necessary to create a new mailing.

Simple mail merge. A simple mail merge combines one data file (exported from *The Raiser's Edge*) and one form letter (created in *Word*). The simple mail merge process produces the same letter for all the records contained in the data file. As a result, a personalized letter for your constituents is created in an efficient, time-saving manner.

Toolbar Buttons

The *Raiser's Edge* toolbar contains buttons representing common commands in *Export* and *Mail*. By clicking these buttons, you can easily perform functions, such as saving, without using the menu bar.

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 in the toolbar. For more information about setting up this user option, see the General Options section of the User Options chapter of the *Program Basics Guide*.

Save the current parameter file

Delete the selected export parameter file

Run the data

Execute an existing *Word* merge in *Mail*

Preview Export File Layout or mailing

Print the mailing

Send the mailing as email

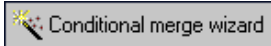Add this export record or mail task to your favorites list
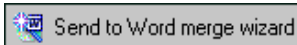
View properties for a selected export

Access help topics

Edit merge document
Opens Microsoft *Word* to create a form letter from *Export*

Conditional merge wizard
Perform a conditional mail merge from *Export*

**Send to Word merge wizard**
Perform a mail merge from *Mail*

The toolbar on the *Word* document contains buttons representing common commands used in *Word*. By clicking these buttons, you can easily perform a function, such as saving, without right-clicking your mouse. Only the main buttons you use in *Word* with **The Raiser's Edge** are covered in this section. For more information about other *Word* toolbar buttons, see the Microsoft help file.
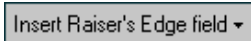
Insert Raiser's Edge field ▾
Add a **Raiser's Edge** field to the *Word* document
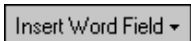
Insert Word Field ▾
Add a *Word* field within the *Word* document
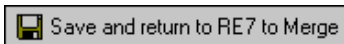
Save and return to RE7 to Merge
Save the *Word* document and return to **The Raiser's Edge**

Mail Merge Overview

A simple mail merge combines one data file (from **The Raiser's Edge**) and one form letter (created in *Word*). To send the same letter to all constituents in a mailing, use a simple mail merge.

A conditional mail merge combines one data file (exported from **The Raiser's Edge**) and a series of form letters (created in *Word*), based on a condition. To send different letters to constituents in a mailing, use a conditional mail merge. For example, when you send donor acknowledgement letters, you can send constituents who give less than $100 one letter and those who give $100 or more another letter, based on the value in the **Gift Amount** field.

For more information about the differences between a simple mail merge and a conditional mail merge, read this section.

What is a Simple Mail Merge?

A simple mail merge combines one data file (exported from **The Raiser's Edge**) and one form letter (created in *Word*). The simple mail merge process produces the same letter for all the records contained in the data file. As a result, a personalized letter for your constituents is created in an efficient, time-saving manner.

The data file contains information specific to each constituent. For example, you can include the name and address, gift amount, and gift date for each donor in the data file. You select the fields you want to include in your letter from *Export* or *Mail*.

A form letter is a *Word* document containing the text you want to repeat in each letter.

If you have existing simple mail merge data files and form letters, you can continue to use the files using the old process. However, we recommend the next time you need to create a new simple mail merge, take advantage of the quick and easy steps within *The Raiser's Edge*. Every step of the old process (which can be complicated) is included when you select the new Blackbaud Simple Word Merge export format in *Export* and the Microsoft Word Mail Merge Wizard in *Mail*. This *Word* integration process eliminates the risk of missing procedures using the old process and saves you time.

What is a Conditional Mail Merge?

A conditional mail merge combines one data file (exported from *The Raiser's Edge*) and a series of form letters (created in *Word*). In addition, a conditional mail merge also contains a mask document (also created in *Word*). The mask document contains the conditional statements used to select the form letter the record in the data file receives.

For example, you are sending letters to every donor who has given to the Playground Site fund or the 2002 Annual Fund to encourage them to donate again. For your conditional mail merge, you will have the data file containing *The Raiser's Edge* fields you need for your letter. You need two form letters— one for those who donated to the Playground Site fund (Letter A) and one for those who donated to the 2002 Annual Fund (Letter B). Lastly, you need a mask document containing the conditional statement that if a donor gave to the Playground Site fund, he receives Letter A or if a donor gave to the 2002 Annual Fund, he receives Letter B. While this may sound like a complicated task, *The Raiser's Edge* creates a conditional mail merge seamlessly as you enter requested information in a mail merge wizard. When the task is complete, a personalized letter for your constituents is created in an efficient, time-saving manner.

To create a conditional mail merge in *The Raiser's Edge*, you can link exports and mail tasks with *Word* documents in just a few time-saving steps. With the click of a button, *The Raiser's Edge* seamlessly creates the mask document and uses it with the data file from *The Raiser's Edge* to merge with the form letters in *Word*.

If you have existing conditional mail merge mask documents, data files, and form letters, you can continue to use the files using the old process. However, we recommend the next time you need to create a new conditional mail merge, take advantage of the quick and easy steps within *The Raiser's Edge*. Every step of the old process (which can be complicated) is included when you select the new Blackbaud Conditional Word Merge export format in *Export* and the Microsoft Word Mail Merge Wizard in *Mail*. This *Word* integration process eliminates the risk of missing procedures using the old process and saves you time.

Plan Your Simple Mail Merge Letter

Before you create a simple mail merge, you should identify *The Raiser's Edge* data you need for your form letter, including the constituent records and gift fields. This helps in setting the parameters of your task and creating a data file with the appropriate information.

Think carefully about the letter you want to write before you start extracting data from *The Raiser's Edge*. Here is a list of points to consider before you get started.

❑ *Who should be included in the mailing?*
   Using *Query*, determine the records you want to include in your data file. For more information about *Query*, see the *Query & Export Guide*.

❑ *What Raiser's Edge information is needed for each letter?*
   This determines which fields you want to include in your data file.

❑ *Where should data appear in each letter?*
   This determines the order of the fields in your data file.

# Create a Simple Mail Merge in Export

Note: If you have existing simple mail merge data files and form letters, you can continue to use the files using the old process. You can also cut and paste the old data into a document formatted using the new formats, converting the old document. However, we recommend the next time you need to create a new simple mail merge, take advantage of the quick and easy steps within *The Raiser's Edge*. Every step of the old process (which can be complicated) is included when you select Blackbaud Simple Word Merge export format in *Export*. The new *Word* integration process eliminates the risk of missing procedures using the old process and saves you time.

You create simple mail merges to retrieve specific information from your database and use the information with a *Word* letter to create custom letters for your organization. There are many examples of when to create simple mail merges in *Export*. You can create them to send action letters, welcome new constituents to your organization, or send a letter to major donor prospects stating you received a reservation for an upcoming event.

▶ **Create a simple mail merge in Export**

In this example, a letter is being sent to major donor prospects letting them know your organization received a reservation for an upcoming event. You can apply the steps in this procedure to any simple mail merge you need to create in *Export*.

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

2. Click **New Export**. The Create a New Export screen appears. For more information about the Export page, see the Export chapter of the *Query & Export Guide*.
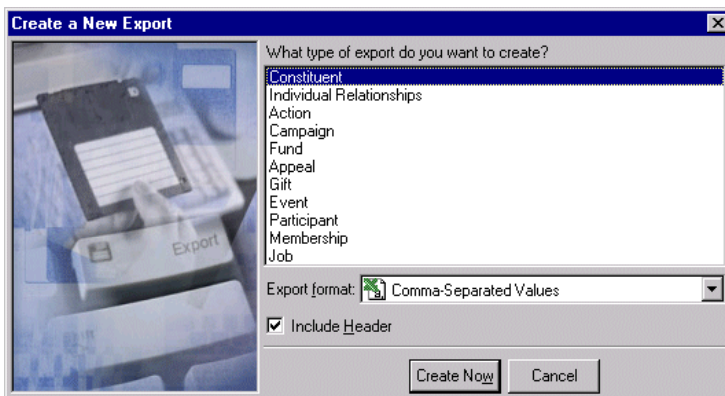
3. In the **What type of export do you want to create** box, select "Constituent".

Note: You can establish your export type and format preferences in User Options. For more information about Export User Options, see the Export chapter in the *Query & Export Guide*.

4. In the **Export format** field, select "Blackbaud Simple Word Merge".

5. Click **Create Now**. The New Constituent Export record screen appears.
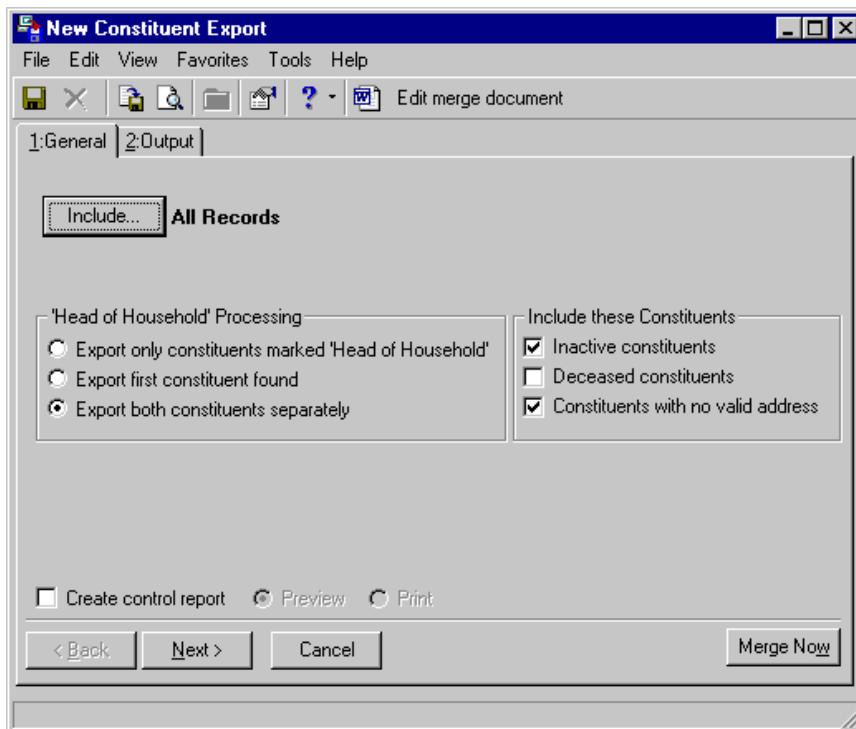
Note: If you select **All Records**, you consider all records found in your database for the export. If you choose **Selected Records**, you must use a query. If you select **One Record**, you locate and use a specific record in your database.

6. On the General tab, click **Include** and choose **Selected Records**. The Open Query screen appears for you to select the query. For more information about opening queries, see the *Query & Export Guide.*
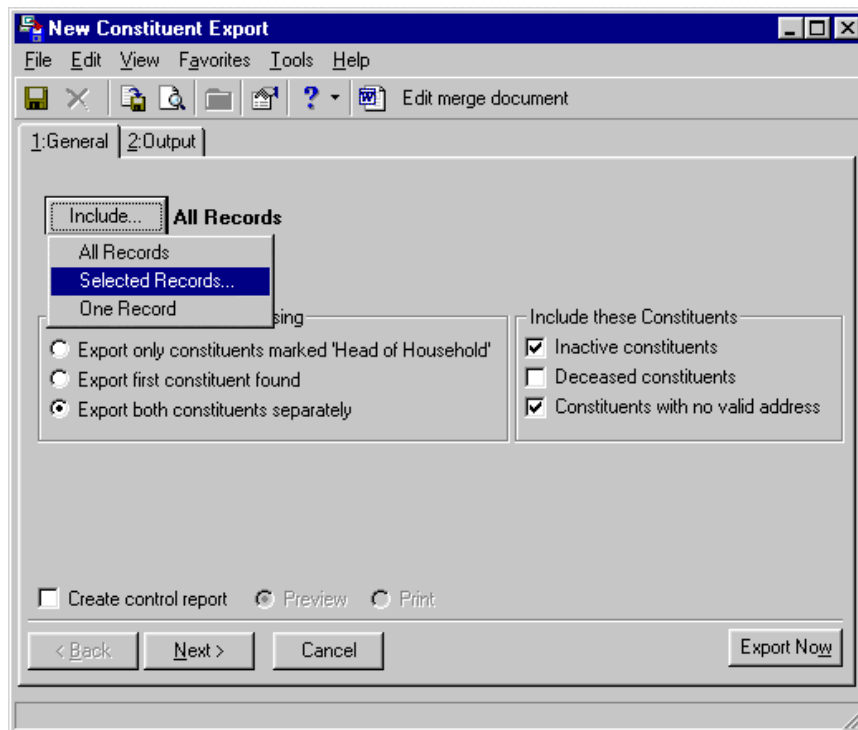
7. In the '**Head of Household' Processing** frame, select **Export both constituents separately** to specify that each constituent should have his criteria appear in the export.

8. Unmark all the checkboxes in the **Include these Constituents** frame. You want to exclude inactive, deceased, and constituents with no valid address.

Note: We recommend you print a control report. The control report lists the location of the newly created file and the order of the exported fields. You can do this by marking **Create control report** and selecting **Print** on the General tab or by clicking print on the control report preview screen.

9. To create a control report for the constituent export, mark the **Create control report** checkbox. A control report summarizes the export's characteristics and field criteria.

10. To preview the control report, select the **Preview** option.

Note: The first field in the **Output** box of an export is either the export's name (for saved exports) or the export type (for exports not saved).

11. Select the Output tab.

Note: For more information about including fields for your export, see the Export chapter of the *Query & Export Guide*.

12. In the **Show** field, select a specific group of fields, or select "<All>" to see a complete list of Available Field categories.

13. To export the first field you want, click the plus sign to the left of the group name to reveal the criteria field for your data file.

14. Highlight the field and click **Select**. The selected output criteria field and its parent criteria group appear in the **Output** box.

15. Repeat these steps to include the additional fields you want.
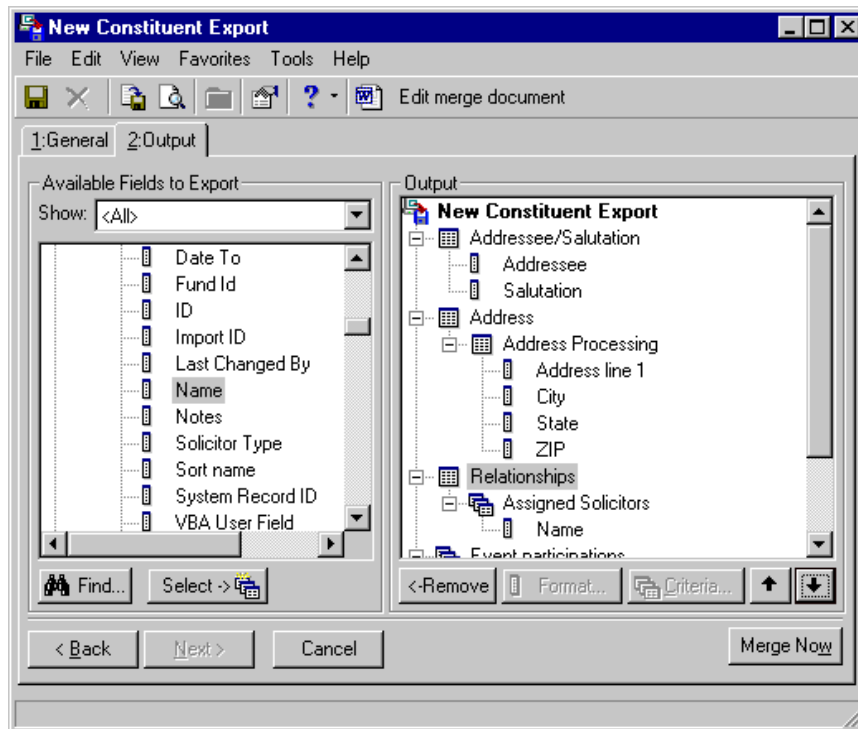
A form letter is a *Word* document containing the text you want to repeat in each letter.

16. On the toolbar, click **Edit merge document**. *Word* opens to a new screen automatically for you to create your form letter.
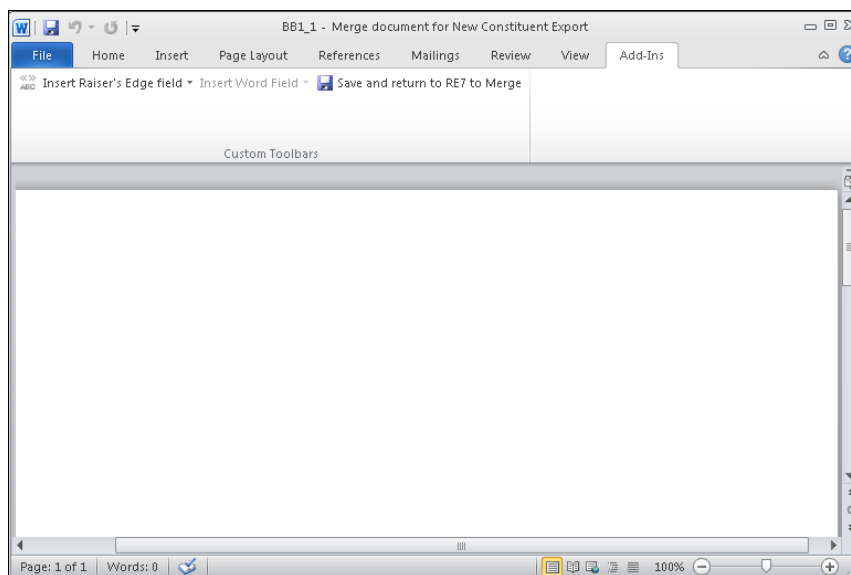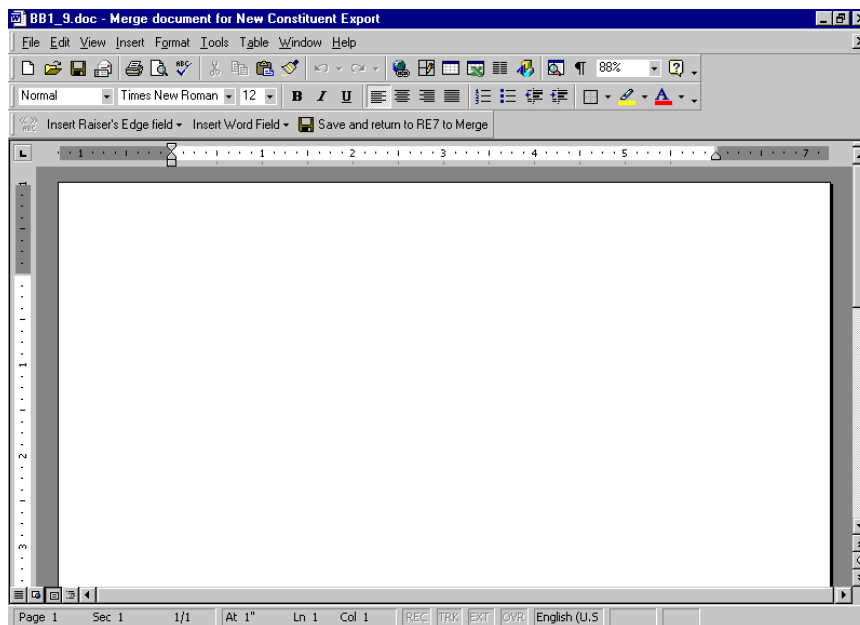
Warning: If you have a version of Microsoft *Word* prior to *Word 2000*, you can see the integration options, but you cannot perform an integrated mail merge using ***The Raiser's Edge***. To take full advantage of the enhanced features, you must have *Word 2000*, *XP*, *2003*, *2007*, or *2010* installed on your computer.

17. Click **Insert Raiser's Edge field** on the toolbar. A list of the fields in the data file appears.
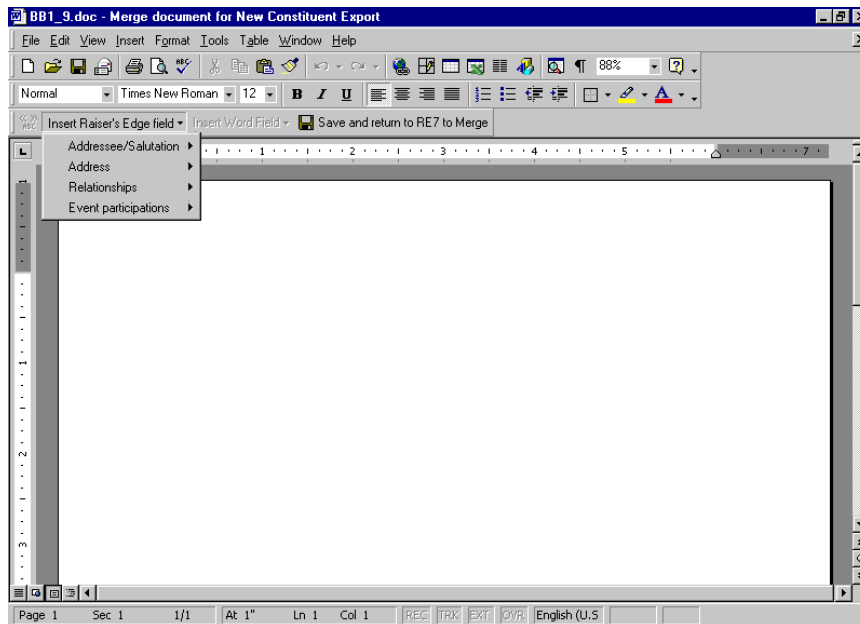
For Microsoft *Word 2007* and *2010*, the **Raiser's Edge** toolbar appears on the Add-Ins tab of the Microsoft *Word* ribbon.
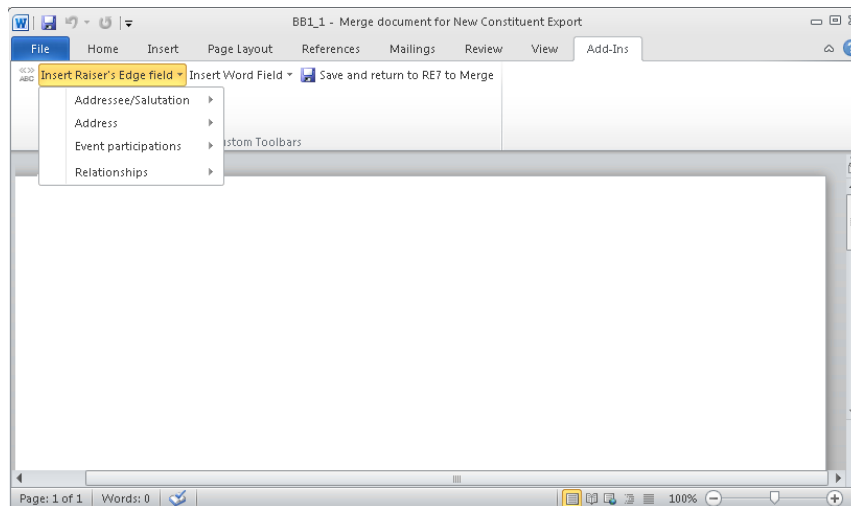
18. To place a field in the form letter, place your cursor where you want the field in *Word*.

19.   Select the field you need from the **Insert Raiser's Edge field** list to add the field.

Note: By selecting **Tools**, **Spelling and Grammar** from the menu bar, you can make sure you do not have spelling mistakes in your form letter. You can also search for a different word to use, with the same meaning, by selecting **Language**, **Thesaurus** from the **Tools** menu bar. You can find similar *Word* integration on Notepad screens in *The Raiser's Edge*. On a Notepad screen, you can press **F7** on your keyboard; select **Tools**, **Spelling** from the menu bar; or click the **Spelling** button on the toolbar to spell check your note. You can press **SHIFT** + **F7** on your keyboard or select **Tools**, **Thesaurus** from the menu bar to access the thesaurus.

20. As you write your text for the form letter, repeat these steps to continue placing the fields you want in the letter.
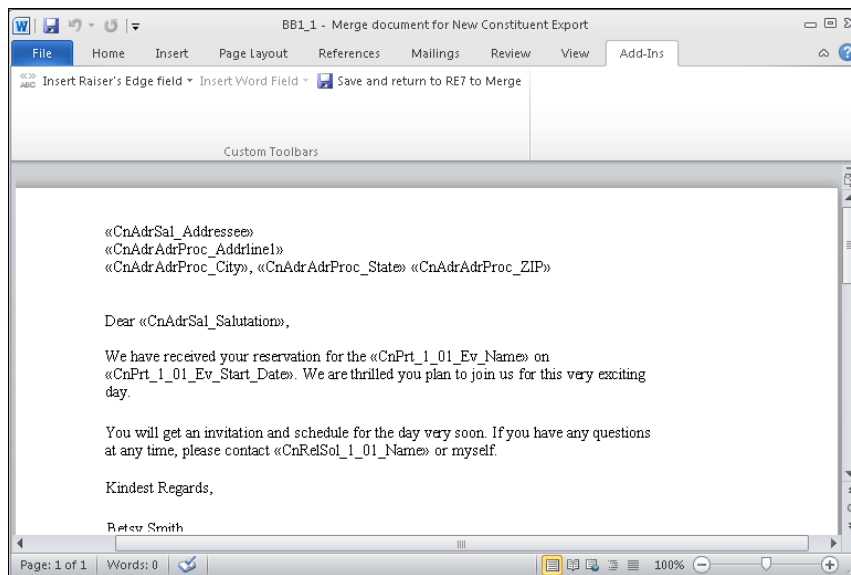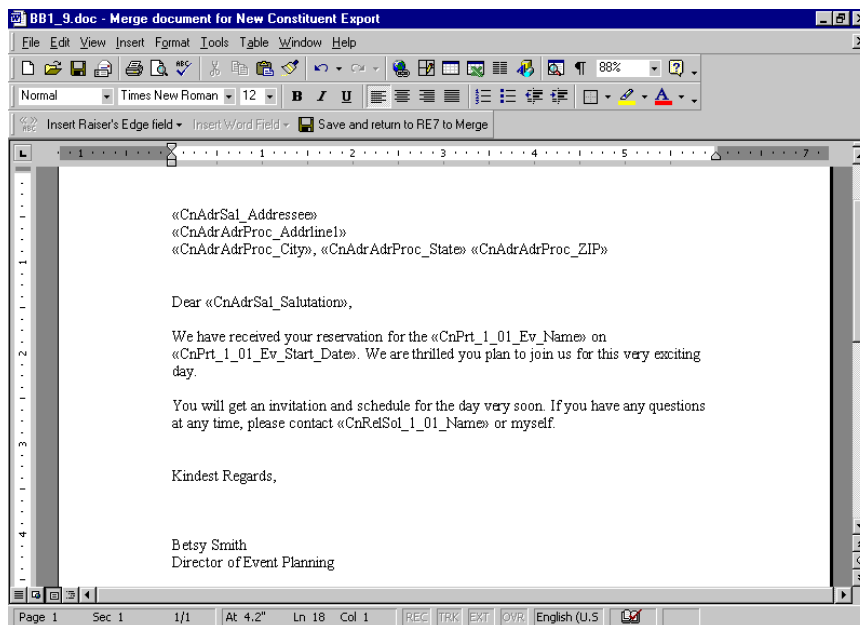
21. To return to *Export* to continue the mail merge process, click **Save and return to RE7 to Merge**. You return to the New Constituent Export screen.
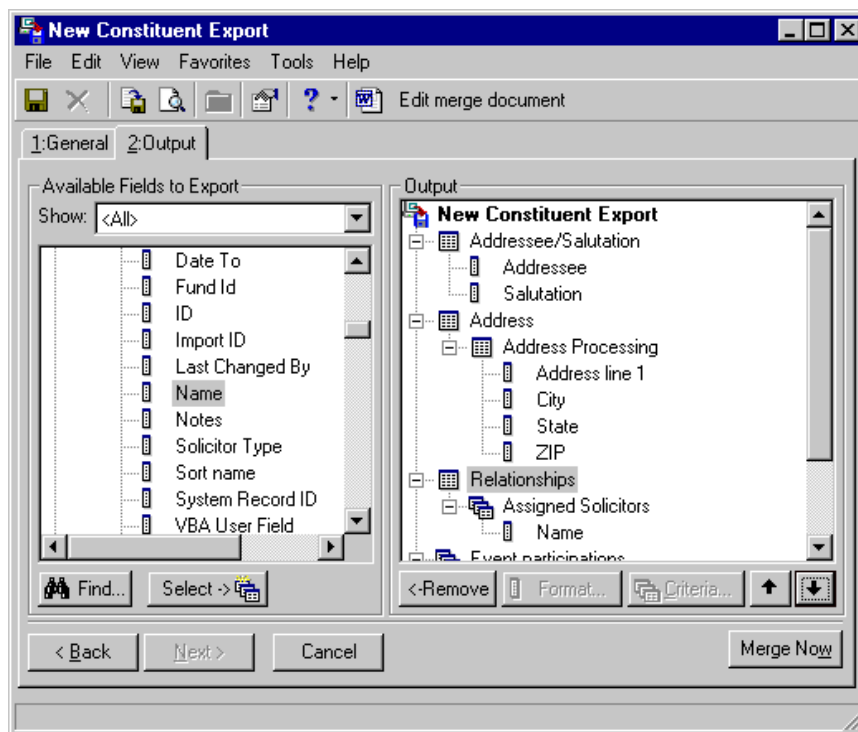
22. To begin the mail merge, click **Merge Now**. The Export file name screen appears.
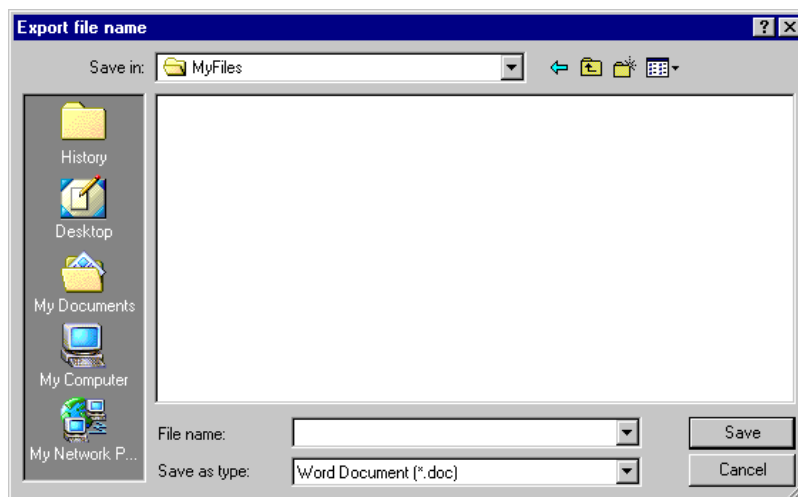
23. In the **Save in** field, assign a location to your data file. For example, you may want to save this to C:\MyFiles, or another folder in which you prefer to store information.

24. In the **File name** field, enter "ProspectLetters" to name the data file for the export.

25. The value in the **Save as type** field defaults to the export type you selected on the Create a New Export screen.
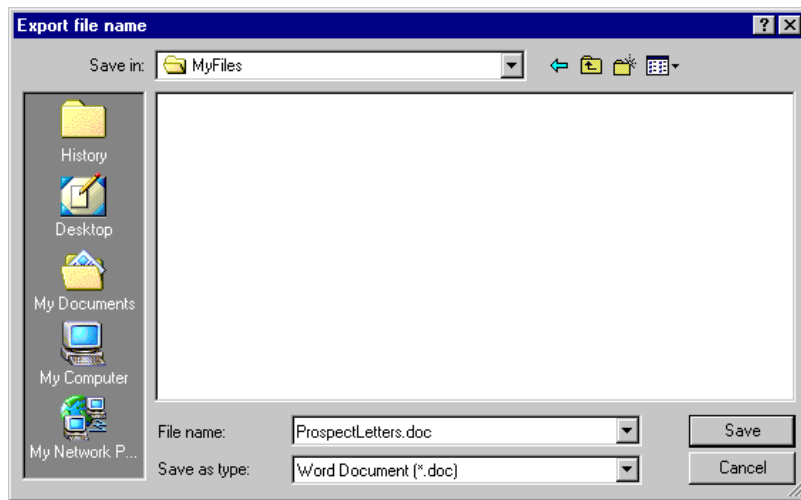
Note: When you click **Save** on the Export file name screen, the data file you are saving contains information exported from your database. Later in this procedure, you will save the export record, which contains the criteria established on the General and Output tabs to use in other exports.

26. Click **Save**. The mail merge processes, and a processing screen appears.
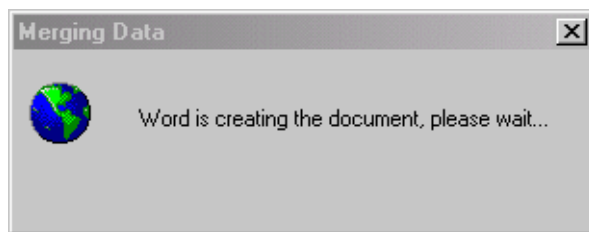
Your merged letters appear automatically in *Word*.
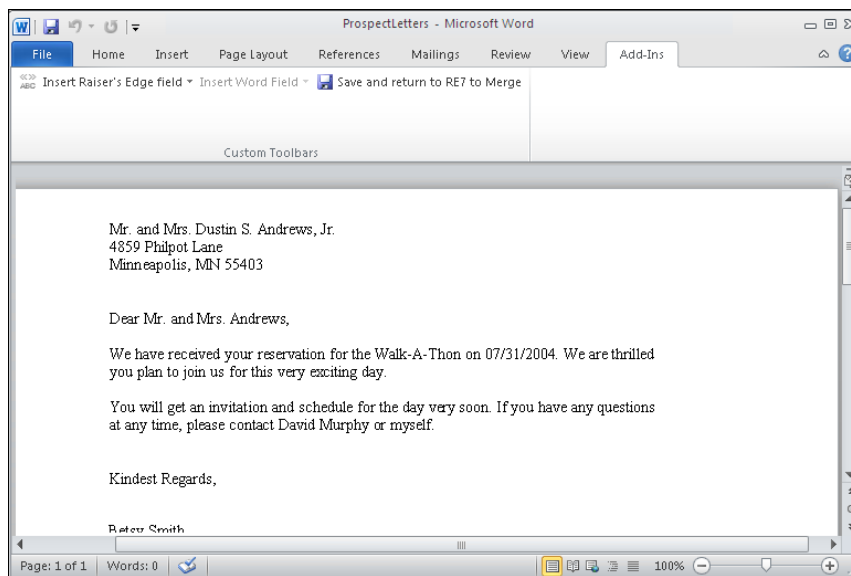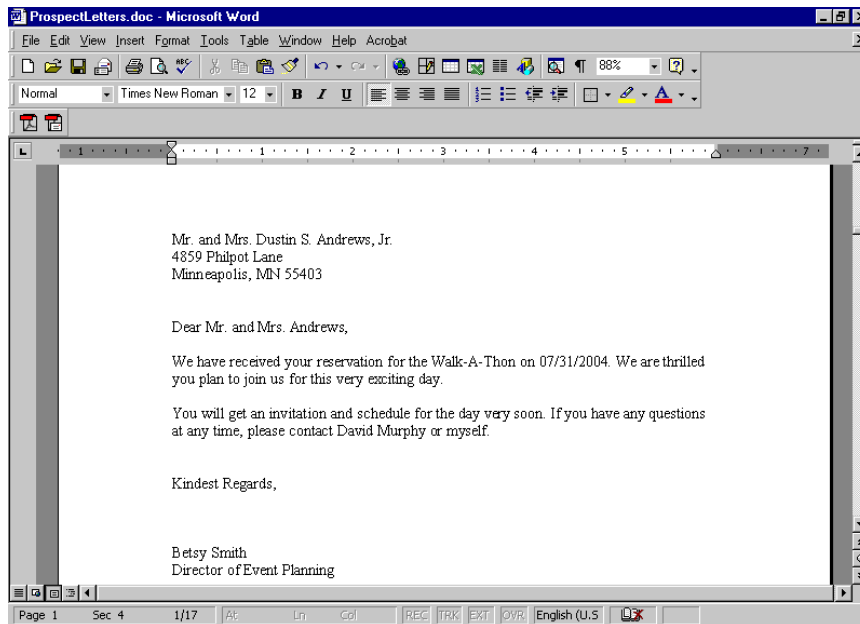
Note: If you want to print the letter, select **File**, **Print** from the menu bar.

27.   To close *Word*, select **File**, **Exit** from the menu bar. You return to *Export*.

Because you marked the **Create control report** checkbox and selected **Preview** on the General tab, the New Export Control Report preview screen appears.
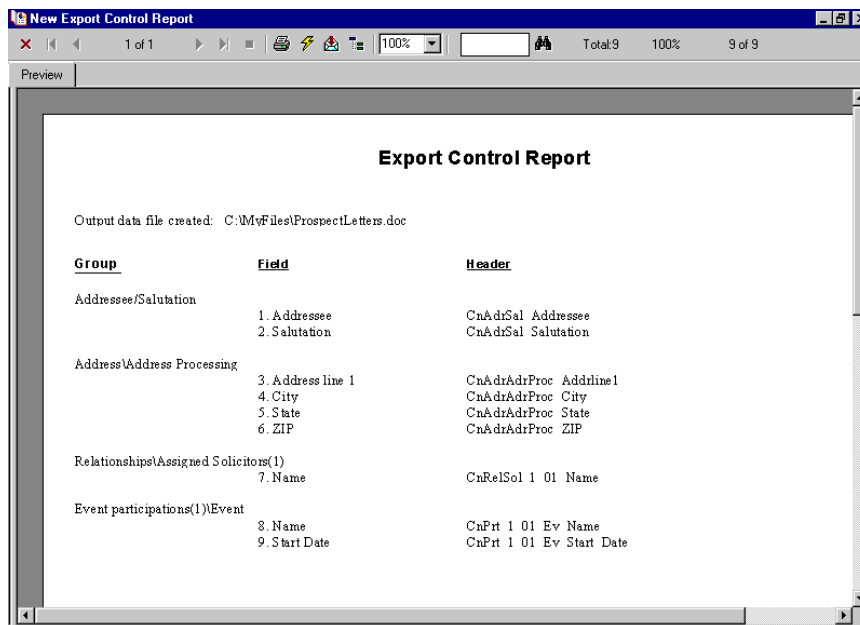
28. To print the Export Control Report, click **Print** on the toolbar.

29. To close the preview screen, click the red "X" on the left hand top corner of the screen. You return to the export record.

30. To save the export record, select **File**, **Save As** from the menu bar. The Save Export As screen appears.
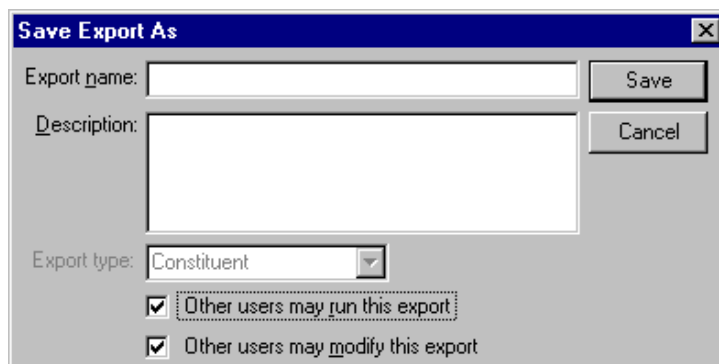
31. In the **Export name** field, enter "Prospect Letters Export".

32. In the **Description** field, enter "Walk-a-Thon letter sent to prospective donors".

33. The **Export Type** field is disabled because you selected Constituent on the Create a New Export screen.

34. If you want to authorize other users to run your export, mark the **Other users may run this export** checkbox.

35. If you want to authorize other users to change your export, mark the **Other users may modify this export** checkbox.
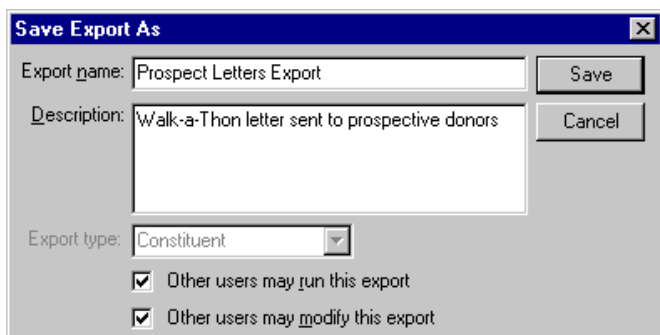
36. Click **Save**. The export record is saved and appears in the list on the Export page.

Create a Simple Mail Merge in Mail

Note: If you have existing simple mail merge data files and form letters, you can continue to use the files using the old process. You can also cut and paste the old data into a document formatted using the new formats, converting the old document. However, we recommend the next time you need to create a new simple mail merge, take advantage of the quick and easy steps within *The Raiser's Edge*. Every step of the old process (which can be complicated) is included when you generate the Microsoft Word Mail Merge Wizard in *Mail*. The new *Word* integration process eliminates the risk of missing procedures using the old process and saves you time.

Simple mail merges are created so you can retrieve specific information from your database and use the information with a *Word* letter to create custom letters for your organization. There are many examples of when to create simple mail merges in *Mail*. You can create them to send Appeal Cards, Donor Acknowledgement Letters, Follow-up Letters, Honor/Memorial Acknowledgement Letters, Membership Cards, Quick Letters, Receipts, Reminders, Renewal notices, and Volunteer Follow-up Letters.

▸ **Select records for a simple mail merge in Mail**

In this example, a donor acknowledgement letter is being sent to all donors who gave a gift today. You can apply the steps in this procedure to any simple mail merge you need to create in *Mail*.

Note: This chapter explains how to select parameters from the most important tabs in *Mail* for completing a mail merge. These tabs are the General and Fields to Include tabs. For information about selecting parameters from the Filters, Gift Types, Attributes, Ind. Address, Org. Address, Postal, and Format tabs, see the *Mail Guide*.

1. On the Raiser's Edge bar, click **Mail**.

2. From the list on the left, highlight the Donor Acknowledgment Letters mail task.

3. To create a new Donor Acknowledgment mail merge, click **New** on the action bar. The New Donor Acknowledgement Letters screen appears.

Note: If you select **All Records**, you consider all records found in your database for the export. If you choose **Selected Records**, you must use a query. If you select **One Record**, you locate and use a specific record in your database.
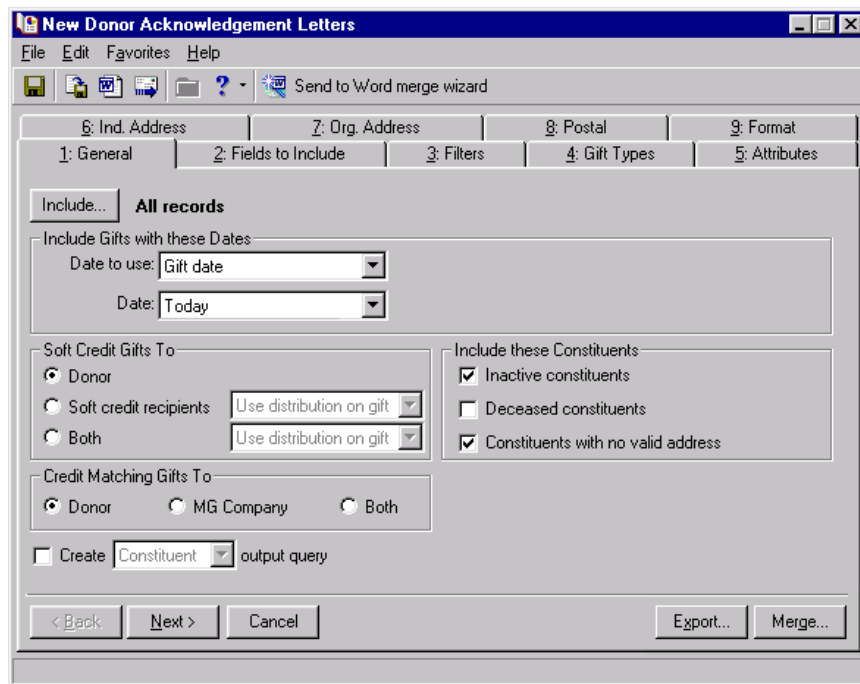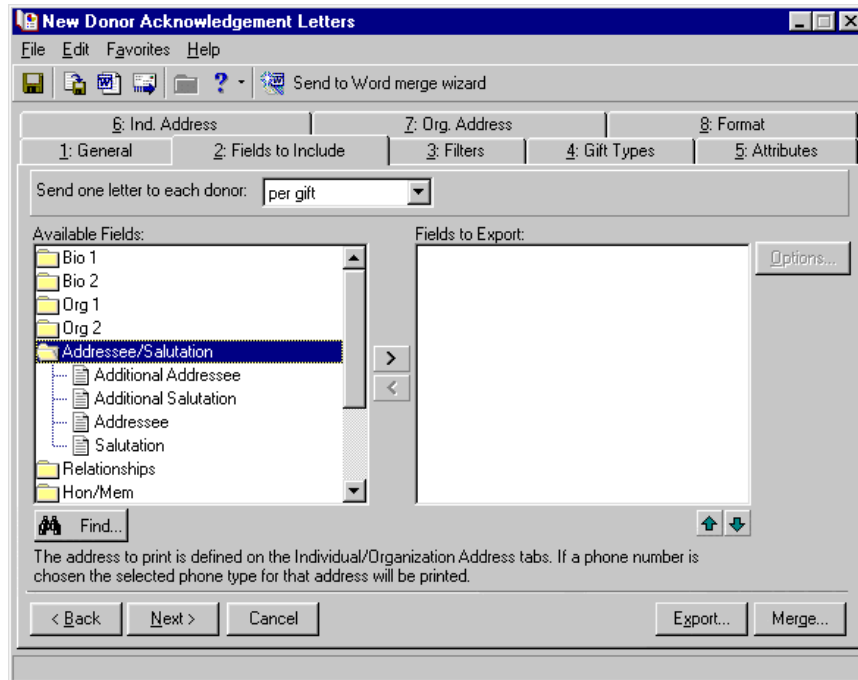
4. On the General tab, click **Include** and select **All Records**.

5. In the **Date to use** field in the **Include Gifts with these Dates** frame, select "Gift date" because you are basing the record selection on when the gift was received.

Tip: You can also select "Last week", which refers to the previous Sunday through Saturday.

6. In the **Date** field, select "Today".

7. For this example, leave the defaults for the checkboxes and options in the **Soft Credit Gifts To**, **Include these Constituents**, and **Credit Matching Gifts To** frames. For more information about these frames, see the *Mail Guide*.

Note: An output query is a static query of all records included in a mailing. You can choose either a constituent or a gift query. A constituent query is based on constituent records. A gift query includes gift records. For example, when printing acknowledgement letters for a group of donors, you can create an output query containing the names of all constituents who received an acknowledgement letter. Later, you can use this query to print address labels or envelopes to mail with the letters. For more information about queries, see the *Query & Export Guide*.

8. Leave the **Create output query** checkbox unmarked. To create an output query of records included in this mailing for possible future use, at the bottom of the General tab, you can mark the **Create output query** checkbox. The corresponding field becomes enabled.

To learn about selecting fields for a simple mail merge in Mail, see "Select fields for a simple mail merge in Mail" on page 25.

▶ **Select fields for a simple mail merge in Mail**

Once you select the records you need for your simple mail merge, select the fields you need for your data file. Any field you select on the Fields to Include tab will be available for you to use in the *Word* form letter. For more information about selecting records, see "Select records for a simple mail merge in Mail" on page 22.

Note: This chapter explains how to select parameters from the most important tabs in *Mail* for completing a mail merge. These tabs are the General and Fields to Include tab. For information about selecting parameters from the Filters, Gift Types, Attributes, Ind. Address, Org. Address, Postal, and Format tabs, see the *Mail Guide*.

1. On the New Donor Acknowledgement Letters screen, select the Fields to Include tab.

Note: If you have default fields in the **Fields to Export** box, highlight the fields you do not want and click the left arrow to move the fields to the **Available Fields** box.

2. In the **Send one letter to each donor** field, select "per gift" to generate one letter for every gift donated.

Sometimes a constituent donates more than one gift that meets the criteria selected on the mail task. In the **Send one Letter to each donor** field, you need to select whether to send one letter for each gift donated or one letter per constituent, regardless of the number of gifts each donated. If you choose "per gift", a constituent receives a letter for every gift donated. If you choose "per donor", each donor receives one letter summarizing all their gifts.

3. First, you are going to select the addressee for the letter. The addressee is the constituent's name, however you wish to format it, that accompanies his address at the top of the letter. From the **Available Fields** box, double-click the folder next to **Addressee/Salutation**. The fields available for this category appear.


Note: If you highlight a folder in the **Available Fields** box and click the right arrow, you move every field available in this folder to the **Fields to Export** box.

4. Under the **Addressee/Salutation** folder, highlight **Addressee** and click the right arrow. The Customization Options for Addressee screen appears.

Note: For more information about defining formats for Addressees/Salutations, see the Configuration chapter of the *Configuration & Security Guide*.

5. In the **Addressee/Salutation To Use** frame, select **From individual**. You want to select the specific format to use for the addressee, which you have established on the donor's record.

6. In the **Use this addressee/salutation if present on the Individual** field, select "Primary Addressee". In the **Otherwise use** field, select <Full Name>.

The name format you choose for **Addressee** will appear with the constituent's address at the top of the letter.

7. Click **OK**. You return to the New Donor Acknowledgement Letters screen.

8. In the **Addressee/Salutation** folder, highlight **Salutation** and click the right arrow. The Customization Options for Salutation screen appears.

9. In the **Addressee/Salutation To Use** frame, select **From individual**.

10. In the **Use this addressee/salutation if present on the Individual** field, select "Primary Salutation". In the **Otherwise use** field, select <Full Name>. You want to use the Primary Salutation you have stored on the donor's record. If this option is not present, you want to use the constituent's full name as the salutation for your letter.

The name format you choose for **Salutation** will appear after the "Dear" in the letter.

11. Click **OK**. You return to the New Donor Acknowledgement Letters screen.

In the **Fields to Export** box, **Addressee/Salutation.Addressee** and **Addressee/Salutation.Salutation** now appear. To make any changes to your selections, highlight one and click the **Options** button on the right.

Tip: It is not necessary to select fields in the exact order you want them to appear in the letters, but it is helpful.

12. You are now ready to select your address for the letter. In the **Available Fields** box, double-click the folder next to **Address**. The fields available for this category appear.

13. Highlight Address line 1 and click the right arrow. Address.Address line 1 appears in the **Fields to Export** box.

If you select Address Block, all address data exports in one field.

Note: You select the specific address you want to mail the letters to on the Ind. Address and Org. Address tabs.

14. Repeat this step for City, State, and ZIP Code so they all appear in the **Fields to Export** box.
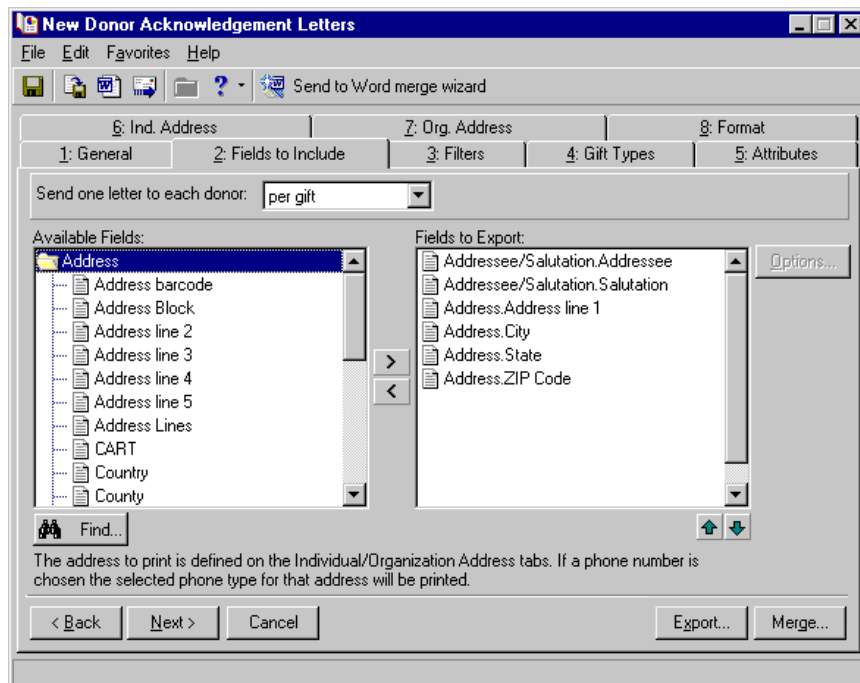
15. Next, you will select gift information to include in the letter. From the **Available Fields** box, double-click the folder next to **Gifts**. The fields available for this category appear.
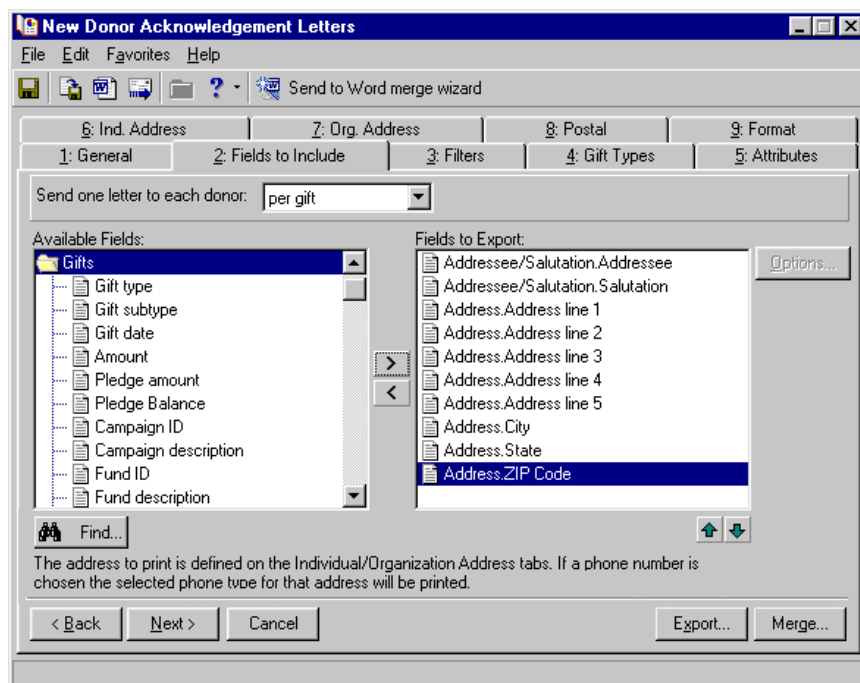
16. Double-click **Gift date**. The Field Options screen appears.
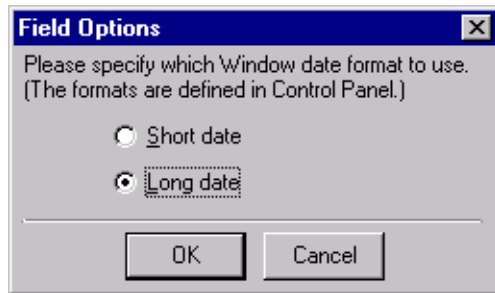
17. Because you want the gift date to appear as "Monday, December 09, 2003" in your letters, select **Long date**.

18. Click **OK**. **Gifts.Gift date (Long date)** appears in the **Fields to Export** box.

19. Because you want the gift amount to appear in the body of the letter, in the **Available Fields** box, double-click **Amount**. **Gifts.Amount** appears in the **Fields to Export** box.

20. Because you want the fund to which the gift was donated written out in the letter, in the **Available Fields** box, double-click **Fund description**. The Field Options screen appears.

Note: This chapter explains how to select parameters from the most important tabs in *Mail* for completing a mail merge. These tabs are the General and Fields to Include tabs. For information about selecting parameters from the Filters, Gift Types, Attributes, Ind. Address, Org. Address, Postal, and Format tabs, see the *Mail Guide*.

21. In the **Number of Fund description fields to export** field, enter "1" to include only one fund description per gift in your mailing.

    Including only one fund description per gift does not mean you are only considering gifts given to one fund. This means that for every gift you include in your mailing, you want to include the description of only one fund, instead of three fund descriptions. For example, for a gift that was split between three funds, the name of only one of those funds appears in the letter.

22. Click **OK**. **Gifts.Fund description (1)** appears in the **Fields to Export** box.

This chapter explains how to select parameters from the most important tabs in *Mail* for completing a mail merge. These tabs are the General and Fields to Include tabs. For information about selecting parameters from the Filters, Gift Types, Attributes, Ind. Address, Org. Address, Postal, and Format tabs, see the *Mail Guide*.

To learn about creating a simple mail merge in Mail, see "Create a simple mail merge in Mail" on page 32.

▸ **Create a simple mail merge in Mail**

Once you have selected the records and fields you need for your simple mail merge, you can begin creating your mail merge. For more information about selecting the records you need, see "Select records for a simple mail merge in Mail" on page 22. For more information about including fields for your data files, see "Select fields for a simple mail merge in Mail" on page 25.

1. Once you complete selecting the parameters for your simple mail merge, click **Send to Word merge wizard**. The Save Mailing As screen appears.
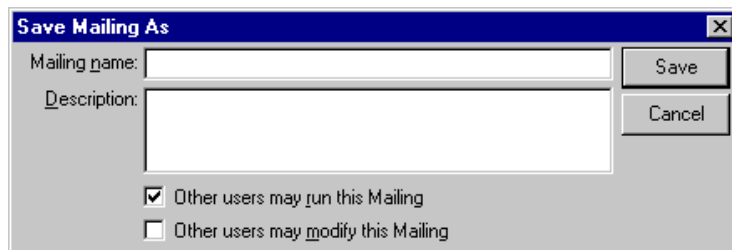
2. In the **Mailing name** field, enter "Gift Acknowledgement Letters".

3. In the **Description** field, enter any additional information you want. For example, you can enter "Simple mail merge sent on a weekly basis to constituents."

4. If you want to authorize other users to run your mailing, mark the **Other users may run this Mailing** checkbox.

5. If you want to authorize other users to change your mailing, mark the **Other users may modify this Mailing** checkbox.

Warning: If you have a version of Microsoft *Word* prior to *Word 2000*, you can see the integration options, but you cannot perform an integrated mail merge using *The Raiser's Edge*. To take full advantage of the enhanced features, you must have *Word 2000*, *XP*, *2003*, *2007*, or *2010* installed on your computer.

6. Click **Save**. The Microsoft Word Mail Merge Wizard appears.

7. Click **Next**. A message appears, asking if you want to mark the gifts as Acknowledged.

Warning: Once the gifts are marked as "Acknowledged", you cannot produce another acknowledgement letter for them unless you change the field back to "Not Acknowledged". This can be done manually or through **Globally Change Records** in *Administration*. For more information, see the *Global Add, Delete, & Change Records Guide*.

8. To automatically update the **Acknowledge** field on the gift records in the export from "Not Acknowledged" to "Acknowledged", click **Yes**. This helps you keep your records up-to-date.

   To prevent the program from automatically changing the **Acknowledge** field on the gift records from "Not Acknowledged" to "Acknowledged", click **No**.

   The next step of the Blackbaud Word Mail Merge Wizard appears.

9. To process a simple mail merge, select **Perform a simple mail merge using only one document**.
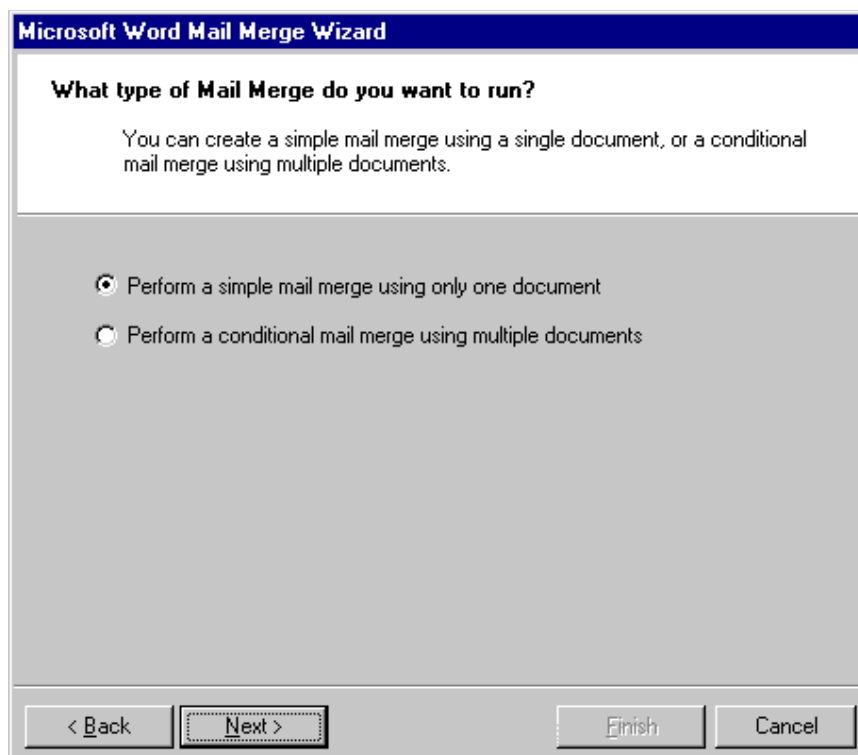
10. Click **Next**. The Create the document and merge the data screen appears.
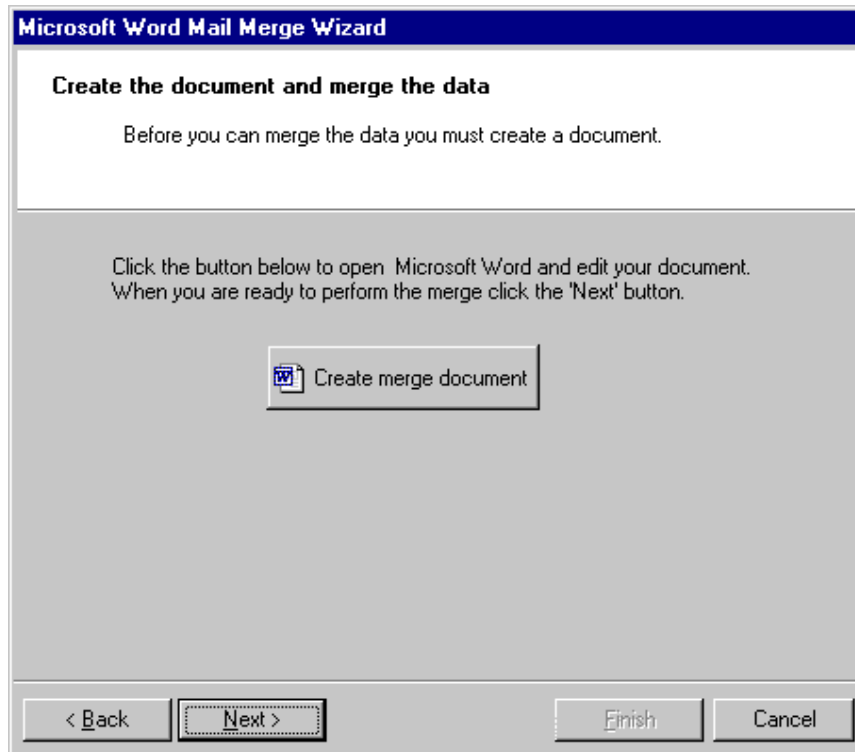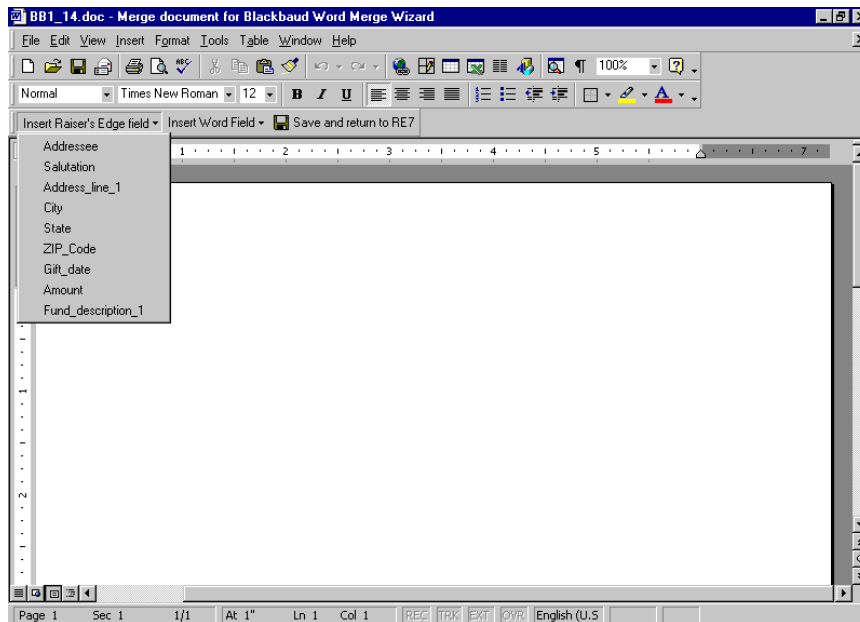
A form letter is a *Word* document containing the text you want to repeat in each letter.

11. Click **Create merge document**. *Word* opens to a new screen automatically for you to create your form letter.
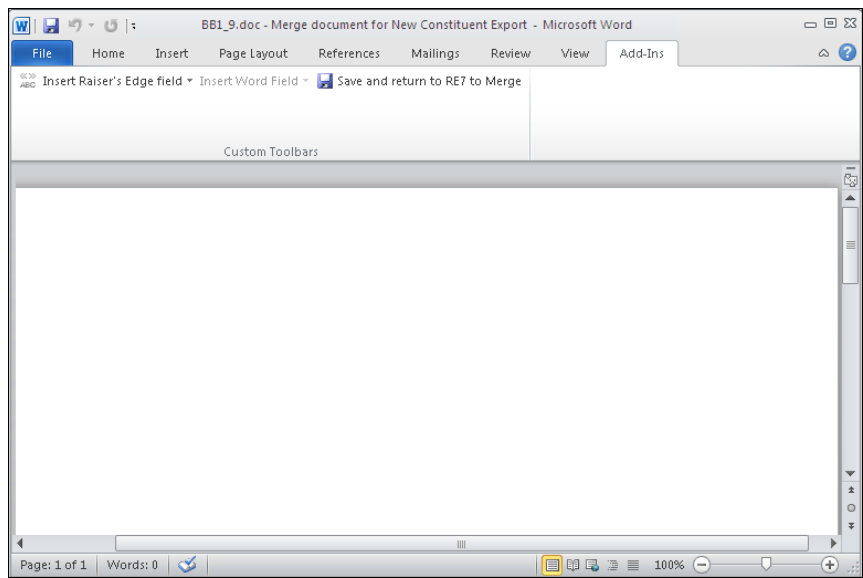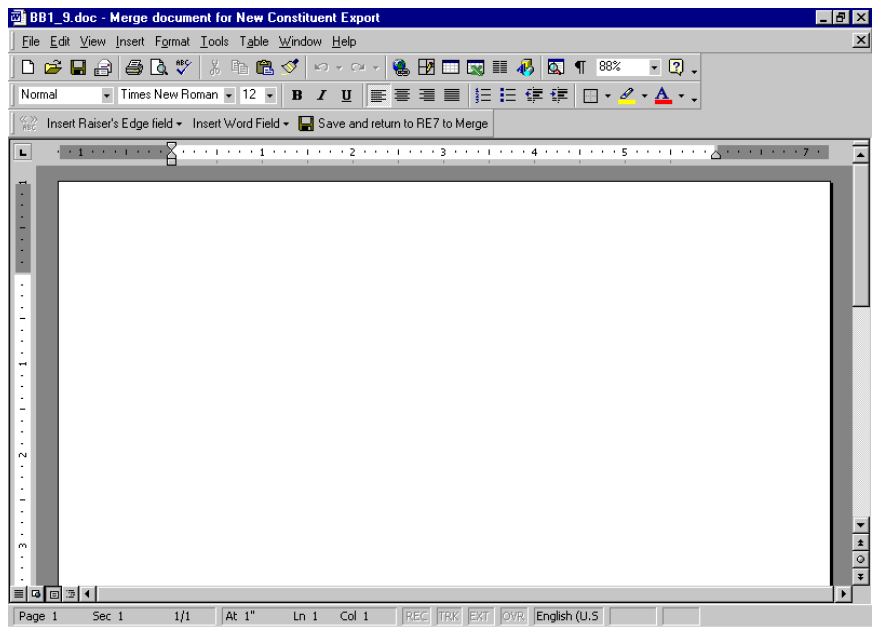
12. Click **Insert Raiser's Edge field** on the toolbar. A list of the fields in the data file appears.
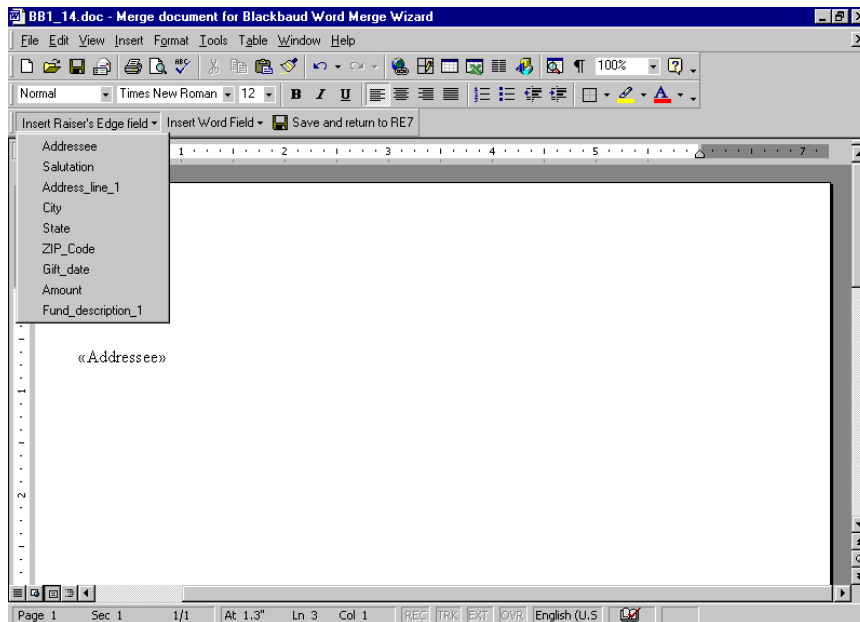
For Microsoft *Word 2007* and *2010*, the **Raiser's Edge** toolbar appears on the Add-Ins tab of the Microsoft *Word* ribbon.
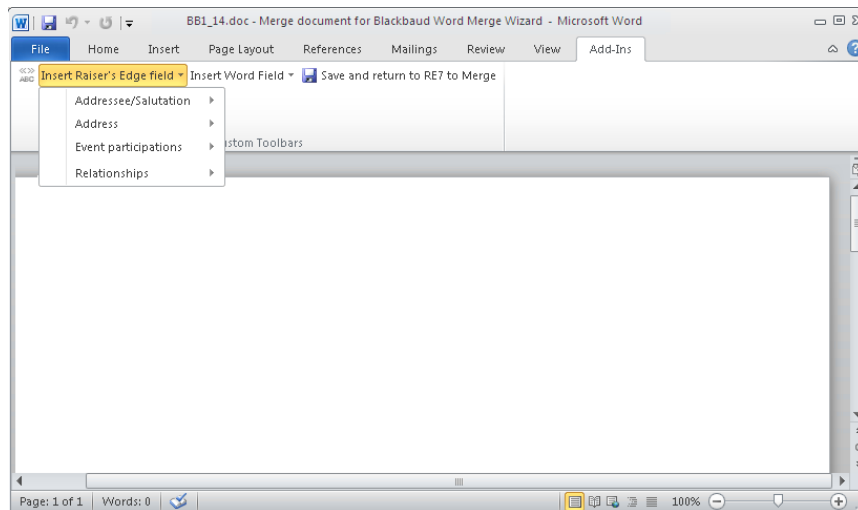
13. To place a field in the form letter, place your cursor where you want the field in *Word*.

14. Click the field you need from the **Insert Raiser's Edge field** list to add the field.
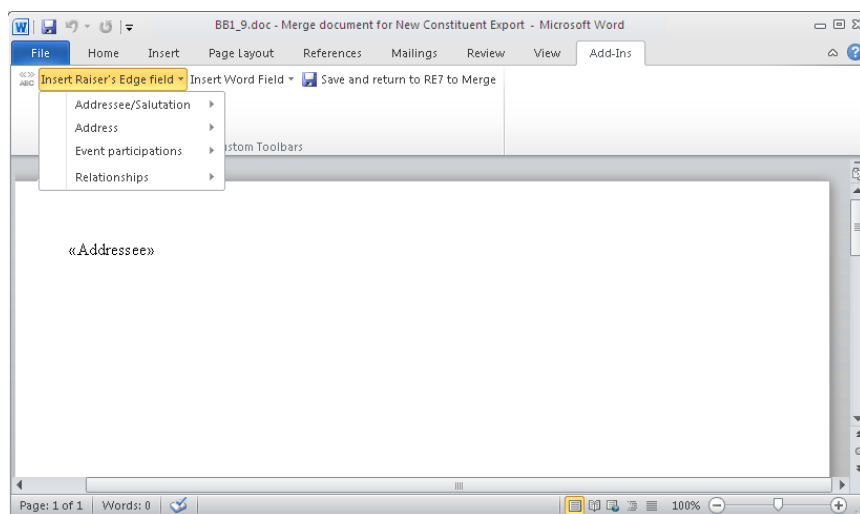
Note: By selecting **Tools**, **Spelling and Grammar** from the menu bar, you can make sure you do not have spelling mistakes in your form letter. You can also search for a different word to use, with the same meaning, by selecting **Language**, **Thesaurus** from the **Tools** menu bar. You can find similar *Word* integration on Notepad screens in *The Raiser's Edge*. On a Notepad screen, you can press **F7** on your keyboard; select **Tools**, **Spelling** from the menu bar; or click the **Spelling** button on the toolbar to spell check your note. You can press SHIFT + **F7** on your keyboard or select **Tools**, **Thesaurus** from the menu bar to access the thesaurus.

15. As you write your form letter, repeat these steps to continue placing the fields you want in the letter.
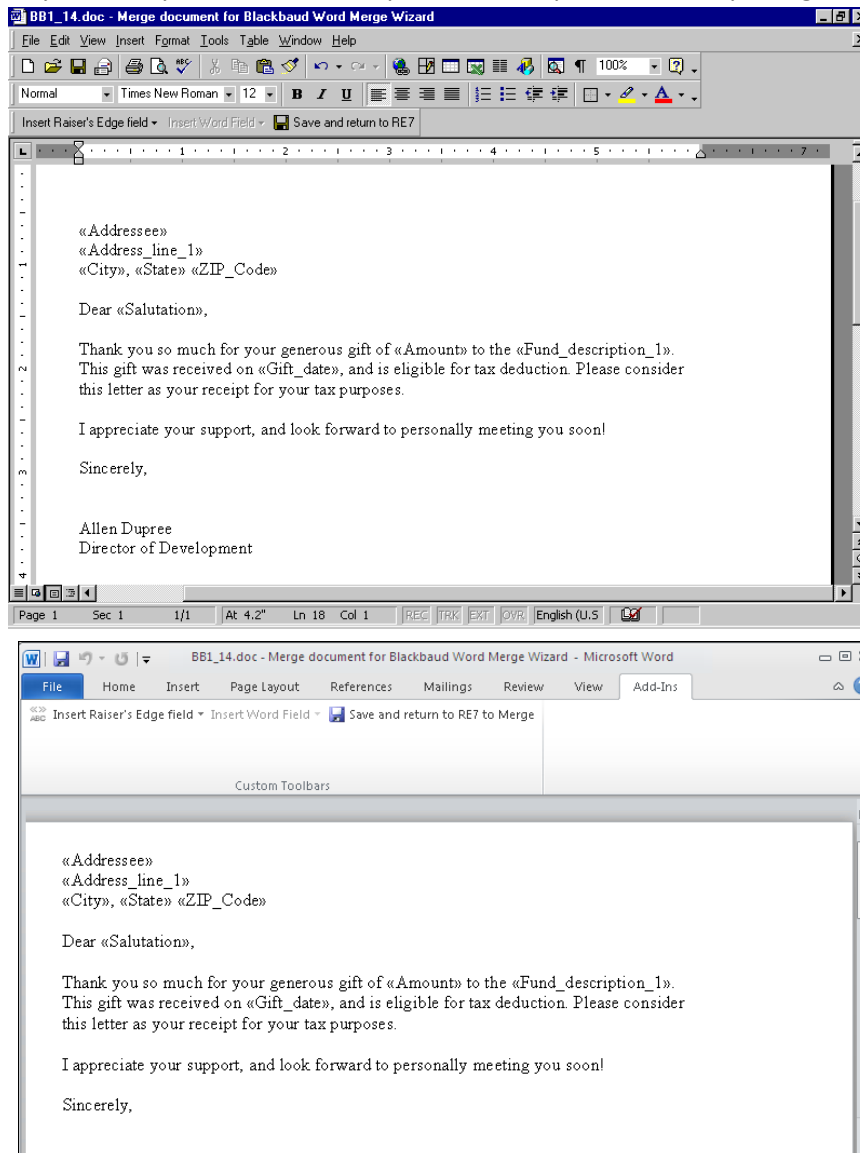
16. To return to *Mail* to continue the mail merge process, click **Save and return to RE7**. You return to the Microsoft Word Mail Merge Wizard screen.

17. Click **Next**. The wizard screen appears so you can save your *Word* mail merge.

Microsoft Word Mail Merge Wizard

Select a file name

Enter a folder path and file name where you want the merged document to be saved.

Save document as: `C:\MyFiles\Gift Acknowledgement Letters.DOC`

Click 'Finish' to create the merged document.

| < Back | Next > | | Finish | Cancel |
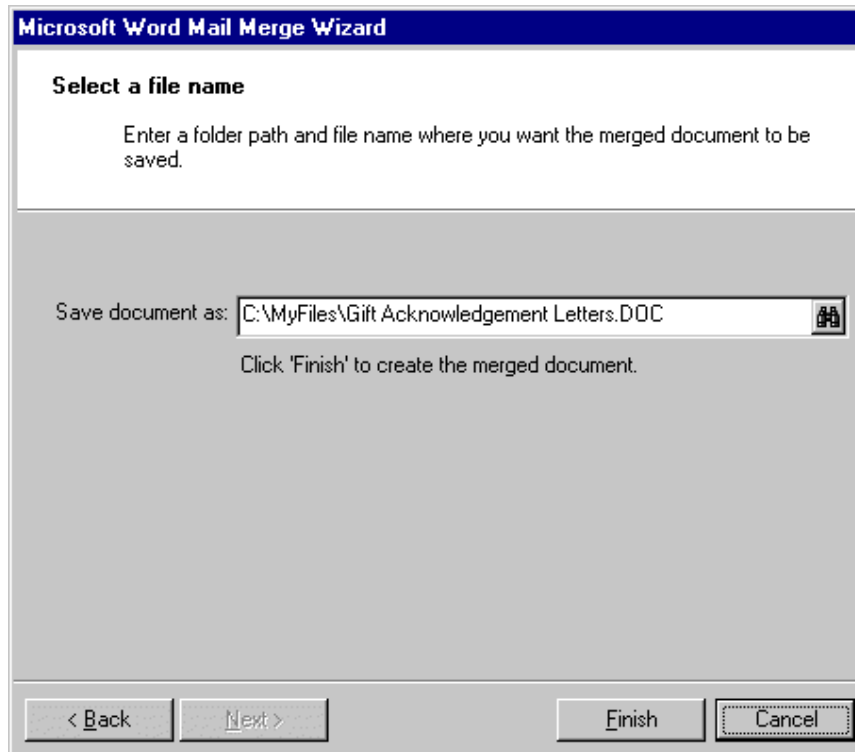
18. To browse for a location on your computer where you want to save the document, click the binoculars.

Tip: To quickly and easily merge letters again from a saved mail task in *Mail*, click **Execute Word Merge** on the toolbar or **Merge** in the lower right corner of the mail task screen. The Confirm File Location screen appears so you can select a location to save the merged letters. After you click **OK**, the mail merge process begins. When complete, your merged letters appear automatically in *Word*.

19. Click **Finish**. The simple mail merge begins processing. When complete, your merged letters appear automatically in *Word*.
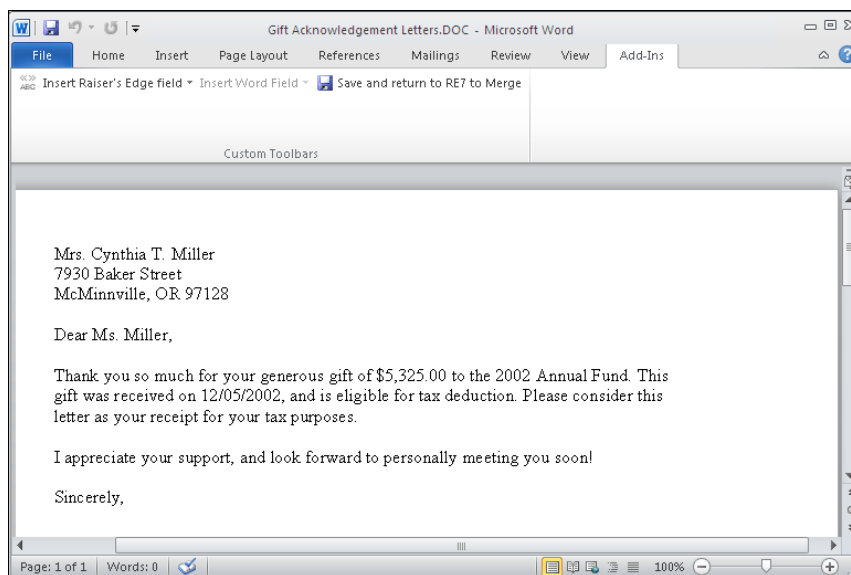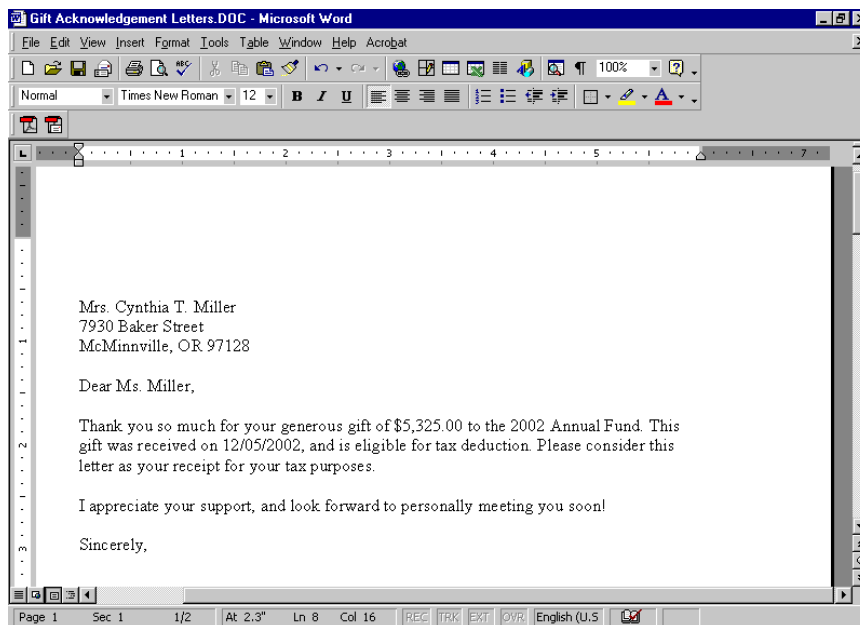
Note: If you want to print the letter, select **File**, **Print** from the menu bar.

20. To close *Word*, select **File**, **Exit** from the menu bar. You return to the Donor Acknowledgement Letters screen.

21. To close the mail task and return to the Mail page, select **File**, **Close** from the menu bar.

Plan Your Conditional Mail Merge Letters

Before you create a conditional mail merge, you should identify *The Raiser's Edge* data you need for your form letter, including the constituent records, gift fields, and your conditional information. This helps in setting the parameters of your task and creating a data file with the appropriate information.

Think carefully about the letter you want to write before you start extracting data from *The Raiser's Edge*. Here is a list of points to consider before you get started.

❑ *Who should be included in the mailing?*
Using *Query*, determine the records you want to include in your data file. For more information about *Query*, see the *Query & Export Guide*.

❑ *What Raiser's Edge information is needed for each letter?*
This determines which fields you want to include in your data file.

❑ *What field should I base the conditional statement on?*
This determines the letter each record in the data file receives.

❑ *Where should data appear in each letter?*
This determines the order of the fields in your data file.

Create a Conditional Mail Merge in Export

Note: If you have existing conditional mail merge mask documents, data files, and form letters, you can continue to use the files using the old process. You can also cut and paste the old data into a document formatted using the new formats, converting the old document. However, we recommend the next time you need to create a new conditional mail merge, take advantage of the quick and easy steps within *The Raiser's Edge*. Every step of the old process (which can be complicated) is included when you select Blackbaud Conditional Word Merge export format in *Export*. The new *Word* integration process eliminates the risk of missing procedures using the old process and saves you time.

Conditional mail merges are created so you can retrieve specific information from your database and use the information with a *Word* letter to create multiple custom letters for your organization. A conditional mail merge combines one data file (exported from *The Raiser's Edge*) and a series of form letters (created in *Word*). In addition, a conditional mail merge also contains a mask document (also created in *Word*). The mask document contains the conditional statements used to select the form letter the record in the data file receives.

There are many examples of when to create conditional mail merges in *Export*. You can create them to send a certain action letter based on the solicitor's name, welcome new constituents to your organization depending on the membership level they purchased, or send a letter to donors requesting a donation increase based on the fund to which they previously donated.

▶ **Create a conditional mail merge in Export**

In this example, a letter is being sent to donors requesting a donation increase based on the fund they previously donated to. You can apply the steps in this procedure to any conditional mail merge you need to create in *Export*.

1. On the Raiser's Edge bar, click **Export**.

2. **New Export**. The Create a New Export screen appears. For more information about the Export page, see the Export chapter of the *Query & Export Guide*.
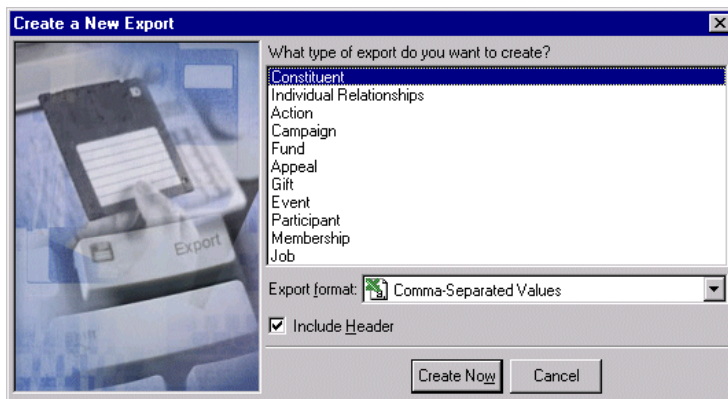
3. In the **What type of export do you want to create** box, select "Constituent".

Note: You can establish your export type and format preferences in User Options. For more information about Export User Options, see the Export chapter in the *Query & Export Guide*.

4. In the **Export format** field, select "Blackbaud Conditional Word Merge".

5. Click **Create Now**. The New Constituent Export record screen appears.
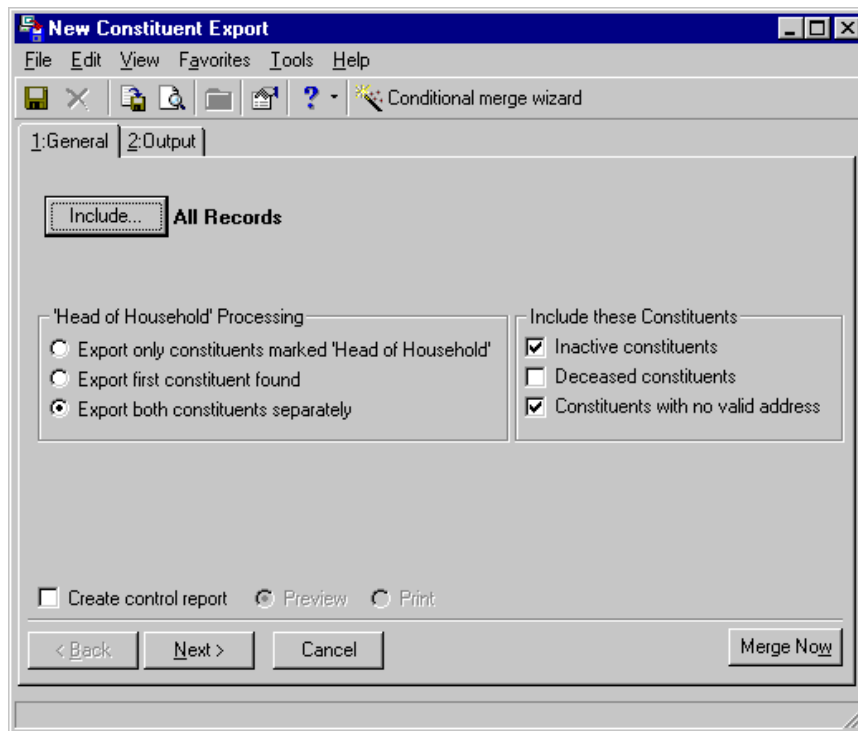
Note: If you select **All Records**, you consider all records found in your database for the export. If you choose **Selected Records**, you must use a query. If you select **One Record**, you locate and use a specific record in your database.

6. To select the specific records to include in the mailing, click **Include** and choose **Selected Records**. The Open Query screen appears for you to select the query you want. For more information about opening queries, see the *Query & Export Guide*.

7. In the **'Head of Household' Processing** frame, select **Export both constituents separately** to specify that each constituent should have his criteria appear in the export.

8. Unmark all the checkboxes in the **Include these Constituents** frame. You want to exclude inactive, deceased, and constituents with no valid address.

Note: We recommend you print a control report. The control report lists the location of the newly created file and the order of the exported fields. You can do this by marking the **Create control report** and selecting **Print** on the General tab or by clicking print on the control report preview screen.

9. To create a control report for the constituent export, mark the **Create control report** checkbox. A control report summarizes the export's characteristics and field criteria.

10. So you can preview the control report, select the **Preview** option.

Note: The first field in the **Output** box of an export is either the export's name (for saved exports) or the export type (for exports not saved).

11. Select the Output tab.

Note: For more information about including fields for your export, see the Export chapter of the *Query & Export Guide*.

12. In the **Show** field, select a specific group of fields, or select "<All>" to see a complete list of Available Field categories.

13. To export the first field you want, click the plus sign to the left of the group name to reveal the criteria field for your data file.

14. Highlight the field and click **Select**. The selected output criteria field and its parent criteria group appear in the **Output** box.

15. Repeat these steps to include the remaining fields you want.
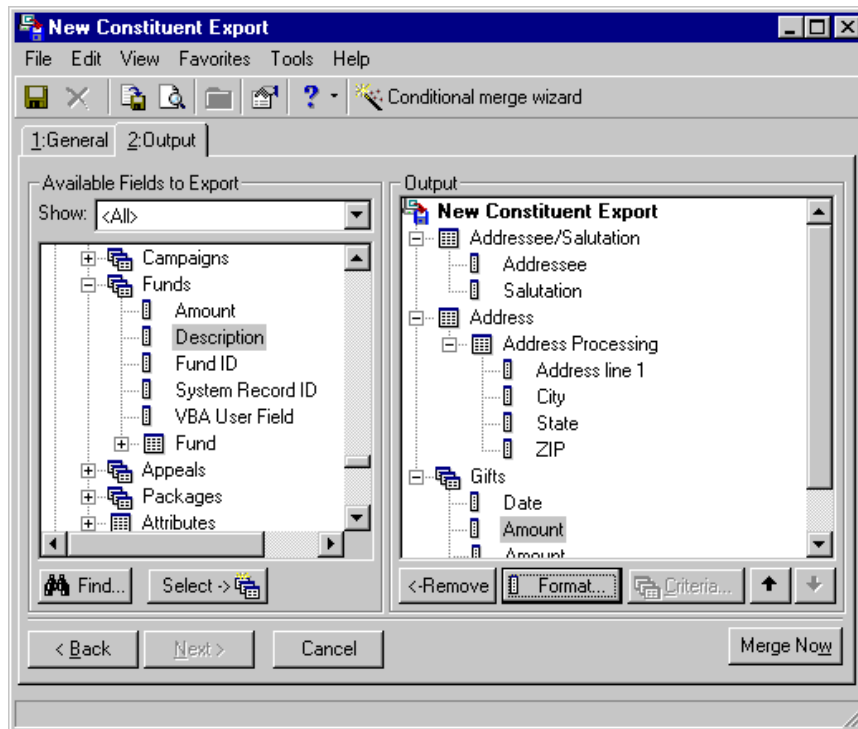
Warning: If you have a version of Microsoft *Word* prior to *Word 2000*, you can see the integration options, but you cannot perform an integrated mail merge using **The Raiser's Edge**. To take full advantage of the enhanced features, you must have *Word 2000*, *XP*, *2003*, *2007*, or *2010* installed on your computer.

16. On the toolbar, click **Conditional merge wizard**. The Blackbaud Conditional Word Merge Wizard appears.
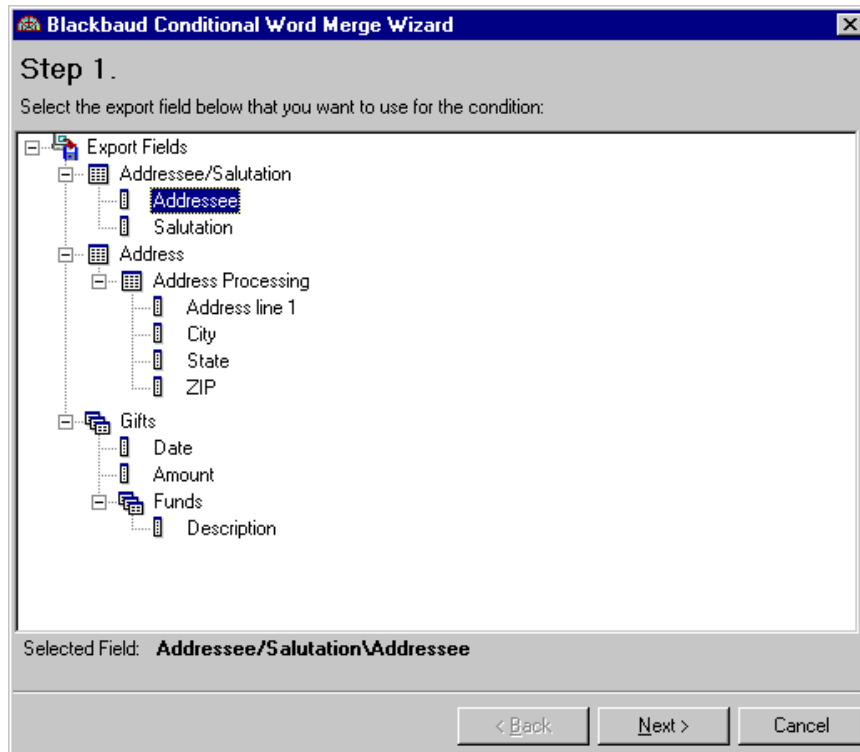
The mask document is the *Word* document that contains a conditional statement used in the conditional mail merge This statement determines the letter each record in the data file receives.

17. Highlight the field on which you want your conditional mail merge to be based for the mask document.

For example, you are sending letters to every donor who has given to the Playground Site fund or the 2002 Annual Fund to encourage them to donate again. For your conditional mail merge, you want to request that if a donor gave to the Playground Site fund, he receives Letter A. If a donor gave to the 2002 Annual Fund, he receives Letter B.

Step 1 of the Blackbaud Conditional Word Merge Wizard generates the mask document. To get the results you need using this example, base the conditional field on **Fund Description**, by highlighting "Description" under **Gifts**, **Funds**.
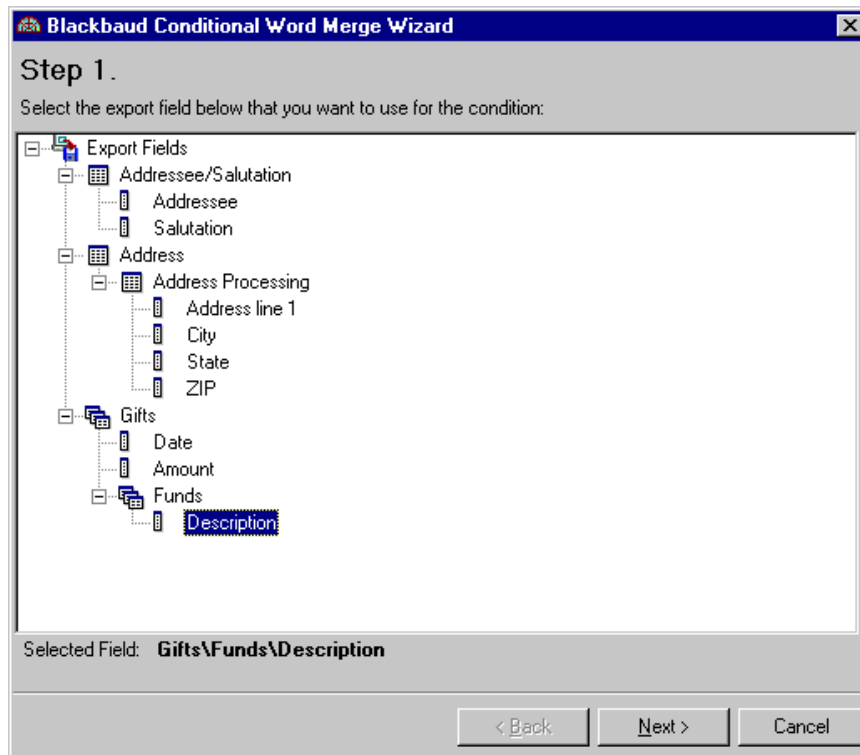
18. Click **Next**. Step 2 of the Blackbaud Conditional Word Merge Wizard appears.
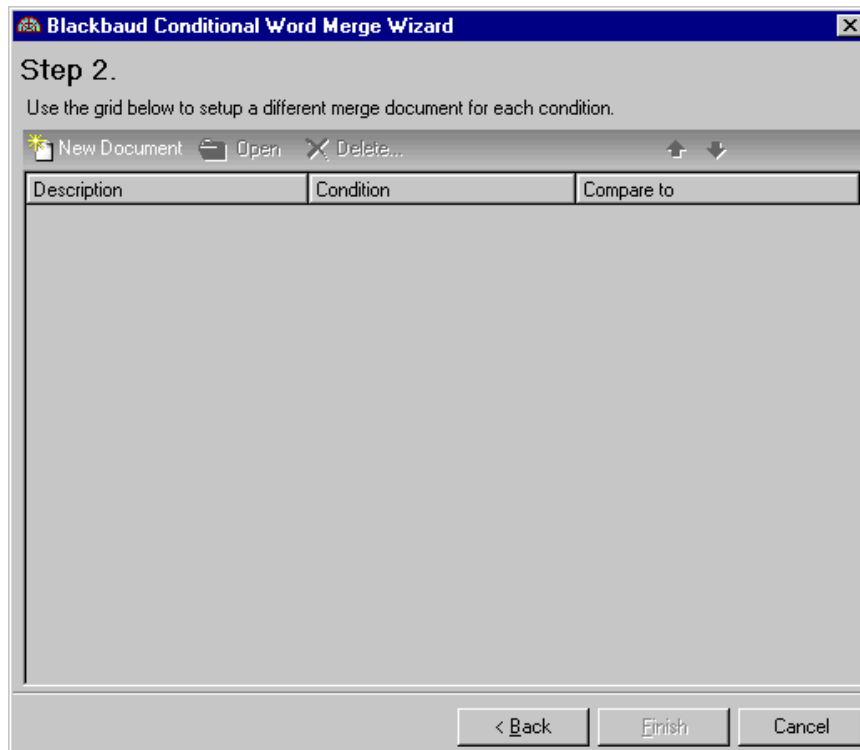
A form letter is a *Word* document containing the text you want to repeat in each letter.

19. To create your first form letter for the conditional merge, click **New Document** on the action bar. The Conditional Merge Document screen appears.
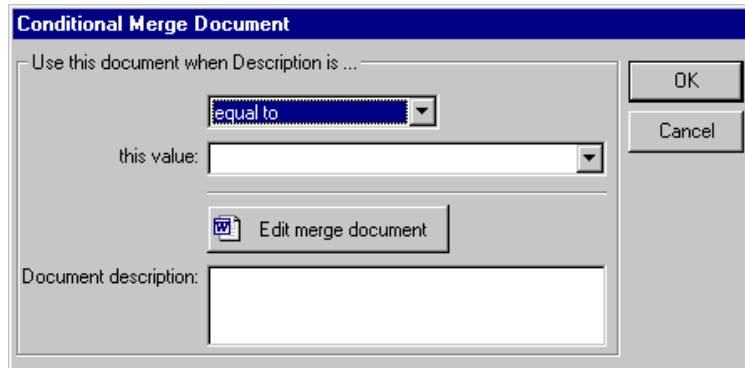
20. In the **Use this document when Description is** frame, leave the default operator "equal to".

21. In the **this value** field, select "Playground Site".

22. Click **Edit merge document**. *Word* opens to a new screen automatically for you to create your first form letter.
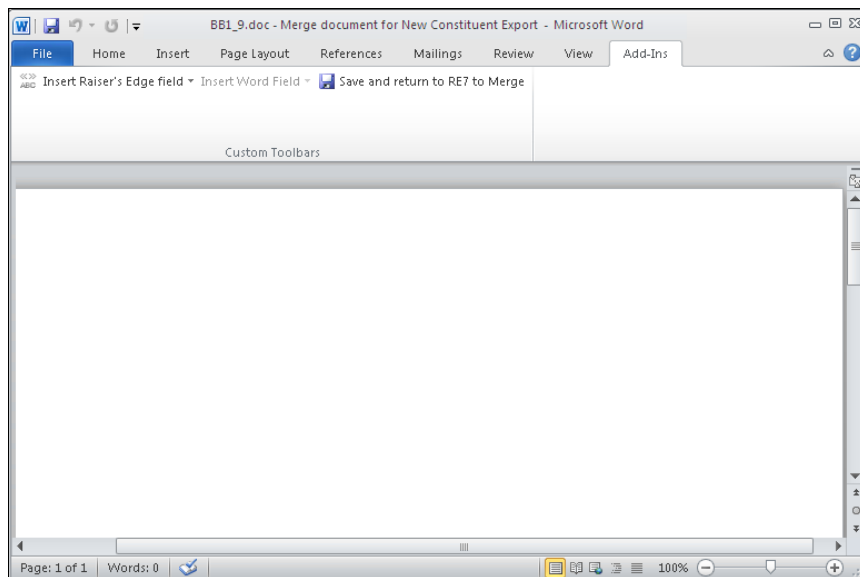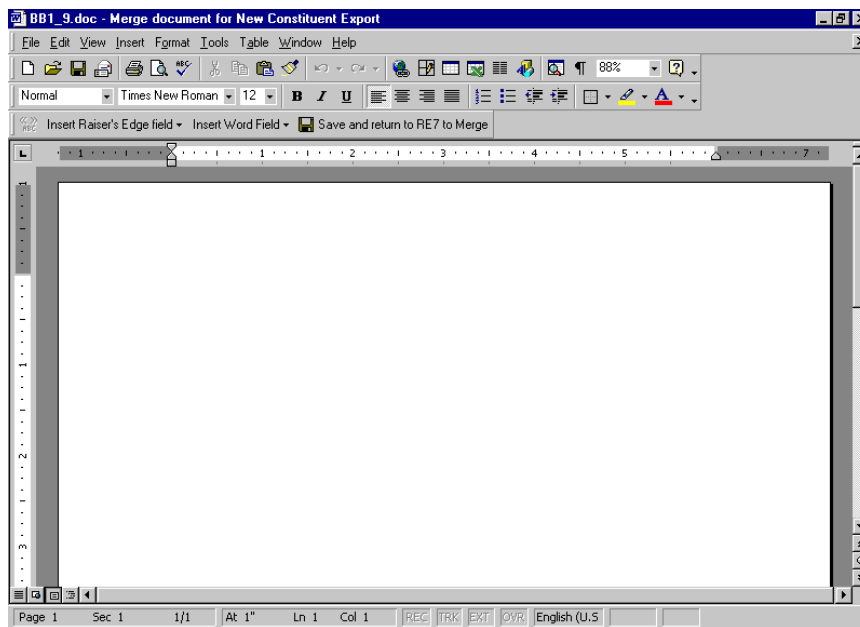
23. Click **Insert Raiser's Edge field** on the toolbar. A list of the fields you selected in the data file appears.
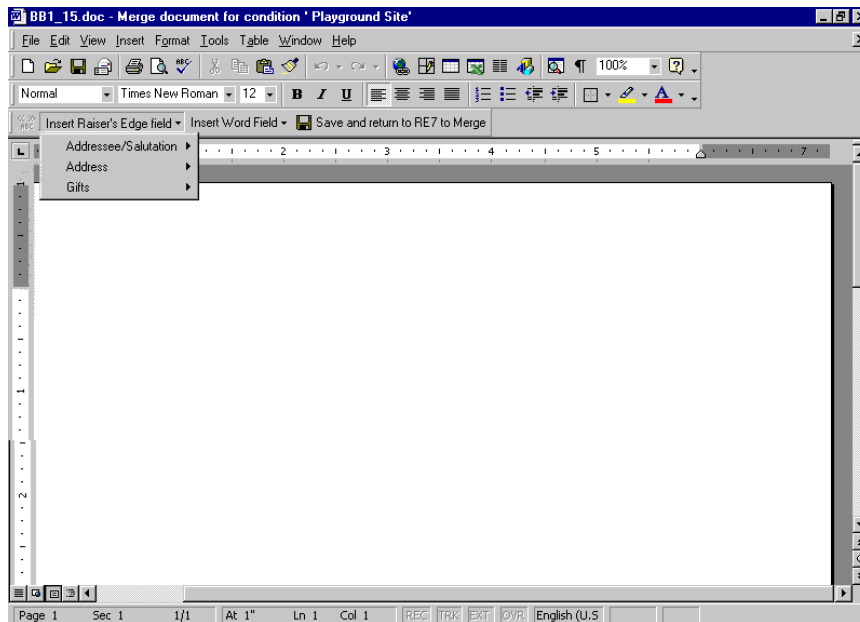
For Microsoft *Word 2007* and *2010*, the **Raiser's Edge** toolbar appears on the Add-Ins tab of the Microsoft *Word* ribbon.
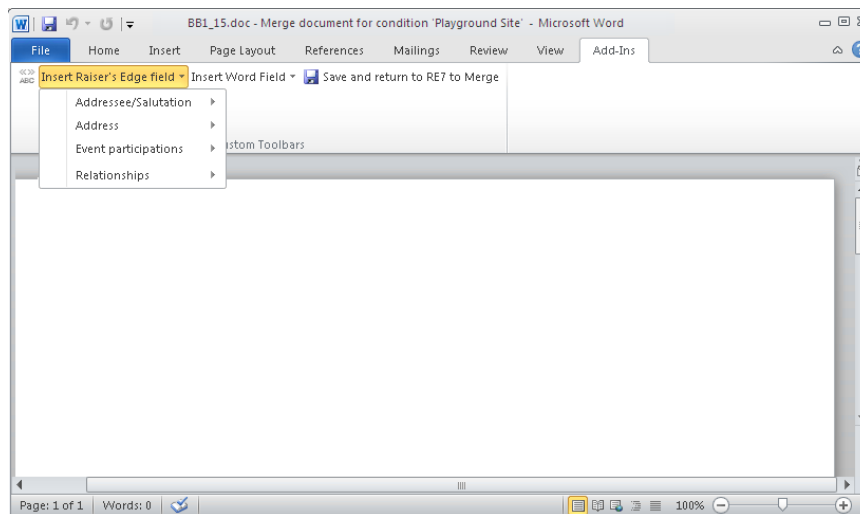
24. To place a field in the form letter, place your cursor where you want the field in *Word*.

25. Click the field you need from the **Insert Raiser's Edge field** list to add the field.
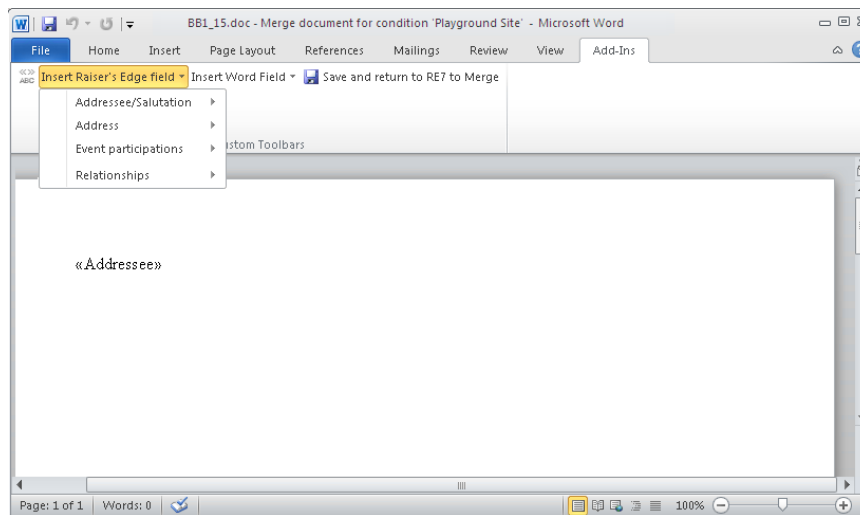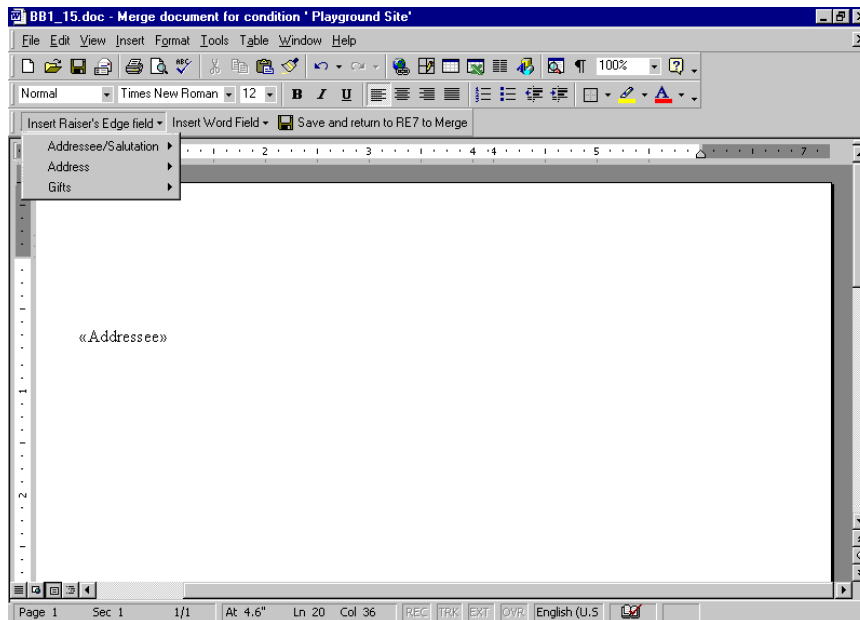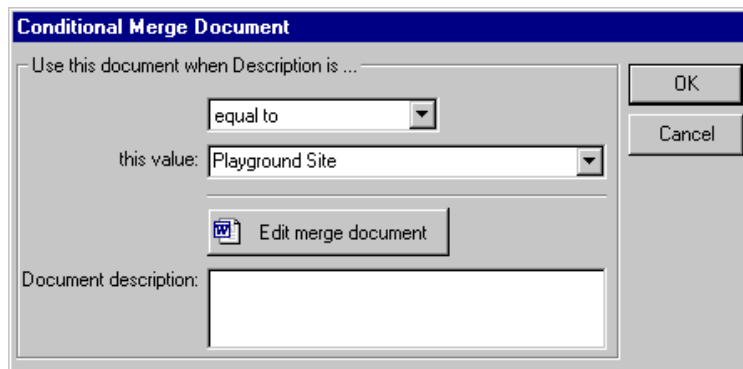
Note: By selecting **Tools**, **Spelling and Grammar** from the menu bar, you can make sure you do not have spelling mistakes in your form letter. You can also search for a different word to use, with the same meaning, by selecting **Language**, **Thesaurus** from the **Tools** menu bar. You can find similar *Word* integration on Notepad screens in *The Raiser's Edge*. On a Notepad screen, you can press **F7** on your keyboard; select **Tools**, **Spelling** from the menu bar; or click the **Spelling** button on the toolbar to spell check your note. You can press **SHIFT** + **F7** on your keyboard or select **Tools**, **Thesaurus** from the menu bar to access the thesaurus.

26. As you write your form letter, repeat these steps to continue placing the fields you want in the letter.

27. To return to *Export* to continue the conditional mail merge process, click **Save and return to RE7 to Merge**. You return to the Conditional Merge Document screen.

Conditional Merge Document

Use this document when Description is ...

equal to

this value: Playground Site

Edit merge document

Document description:

OK

Cancel

28. In the **Document description** box, enter any specific information for the form letter you want. For example, you can add that you requested a 10 percent increase in donation.

Note: The **Compare to** column is useful for determining which letter a constituent should receive when both letters apply to the constituent. For example, Allison Andrews gave to both the Playground Site fund and the 2002 Annual Fund. By using the up and down arrow buttons above the **Compare to** column, you can highlight the letter you want to send to Allison.

29. To return to the Step 2 screen, click **OK**. The first form letter appears in the grid on the screen.

Blackbaud Conditional Word Merge Wizard

Step 2.

Use the grid below to setup a different merge document for each condition.

New Document   Open   Delete...

Description	Condition	Compare to
Requested a 10% increase in donati...	equal to	Playground Site

< Back   Finish   Cancel

Note: If a gift meets more than one condition, *The Raiser's Edge* selects the first condition that is met. For example, Mark Smith donated two gifts, one to the Playground Site fund and one to the 2002 Annual Fund. In this procedure, the condition fund equals Playground Site is the original condition. Therefore, Mark Smith receives a letter for the Playground Site fund.

30. To continue with your second form letter, click **New Document**. The Conditional Merge Document screen appears.
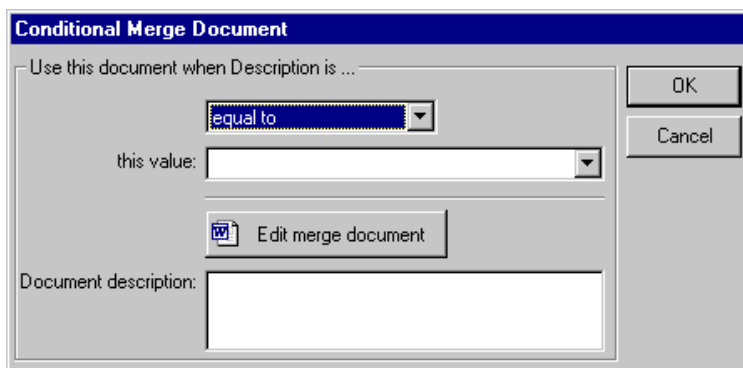
Create this form letter using the same steps you completed to create the first form letter. Continue to add the rest of the form letters you need for inclusion in your conditional mail merge.

31. After you create your last form letter for the conditional mail merge, click **Finish** on the Step 2 screen. You return to the New Constituent Export screen.
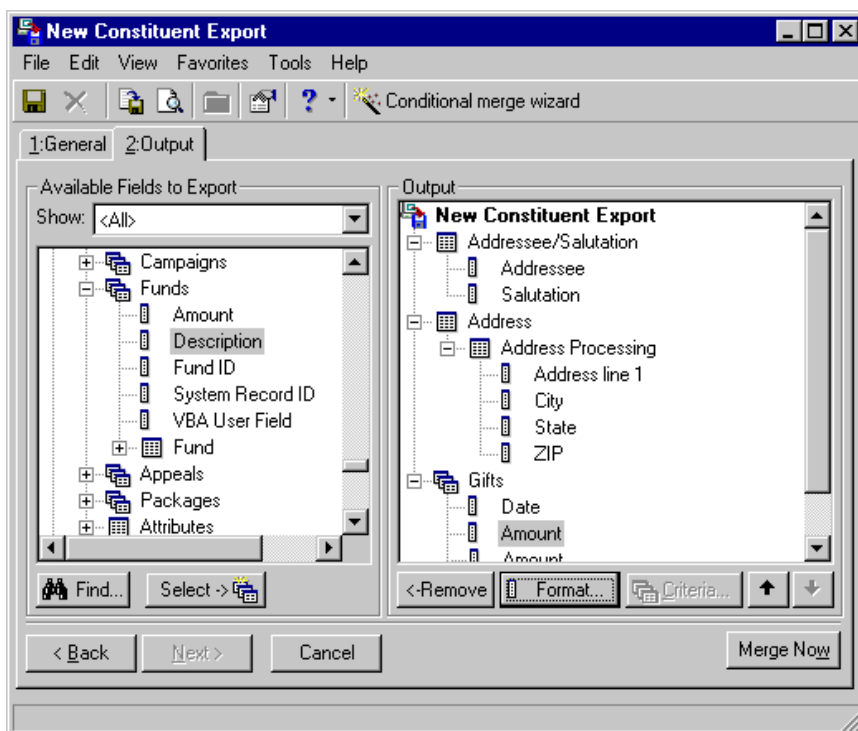
32. Click **Merge Now**. The Save merge documents screen appears.

Save merge documents

Select a name for your merge document and a folder where you want the document to be saved.

Document name:

Save in folder: c:\files [...]

The merge document will be saved as:

[OK] [Cancel]
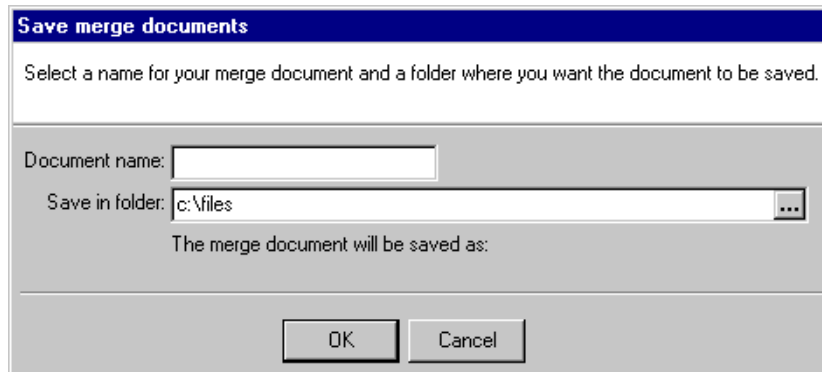
33. In the **Document name** field, enter the name of your conditional merge document.
34. In the **Save in folder** field, click the ellipsis to browse to the location you want to save the document.
35. Click **OK**. The mail merge process begins.
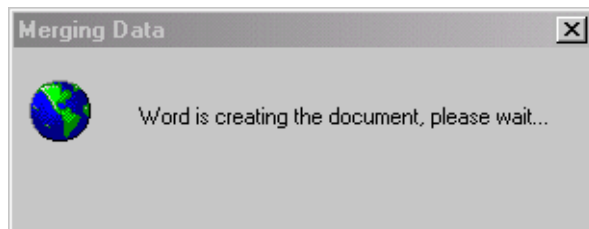
Merging Data [x]

Word is creating the document, please wait...

Your merged letters appear automatically in *Word*.
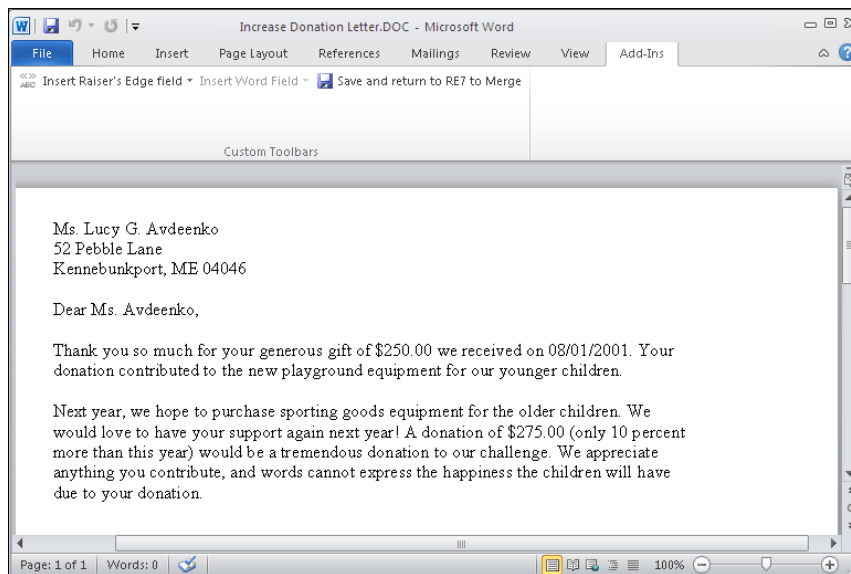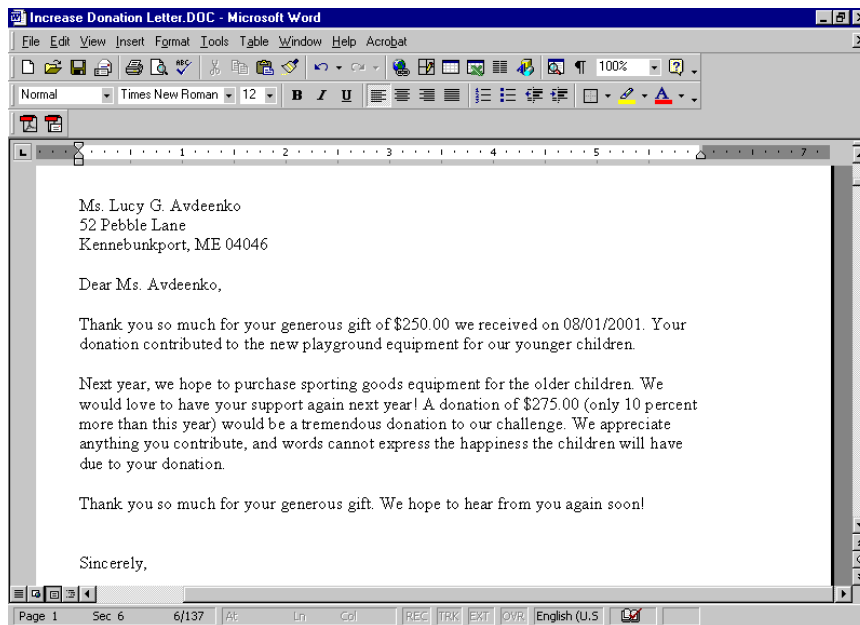
Note: If you want to print the letter, select **File**, **Print** from the menu bar.

36. To close *Word*, select **File**, **Exit** from the menu bar. You return to *Export*. Because you marked the **Create control report** checkbox and selected **Preview** on the General tab, the New Export Control Report preview screen appears.
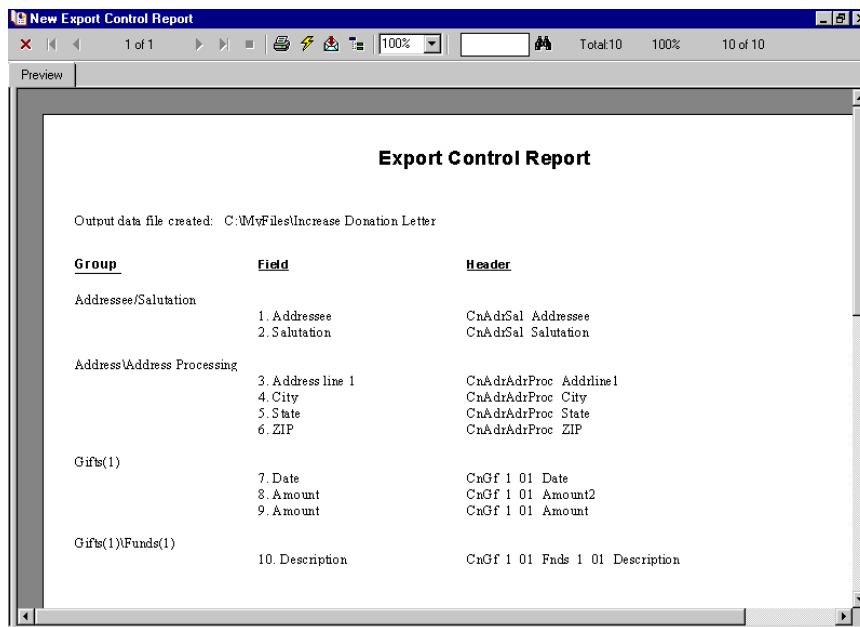
37. If you want to save a hard copy of the fields you exported, click **Print** on the toolbar to print the Export Control Report.

38. To close the preview screen, click the red "X" on the left hand top corner of the screen. You return to the export record.

39. From the menu bar, select **File**, **Save As** to save the export record. The Save Export As screen appears.
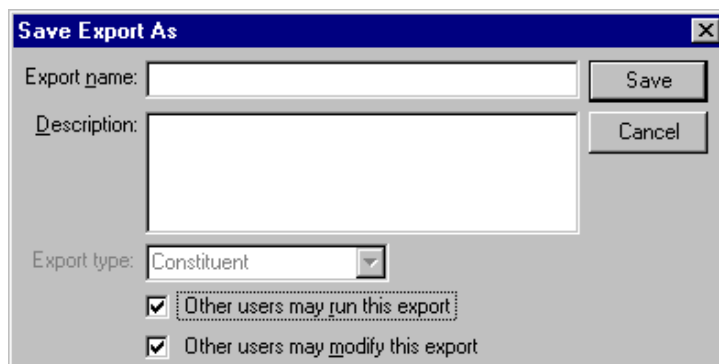
40. In the **Export name** field, enter "Request Increase in Donation Letter".

41. In the **Description** field, enter "Letters sent to donors that gave to the Playground Site fund and the 2002 Annual Fund".

42. The **Export Type** field is disabled because you selected Constituent in the Create a New Export screen.

43. If you want to authorize other users to run your export, mark the **Other users may run this export** checkbox.

44. If you want to authorize other users to change your export, mark the **Other users may modify this export** checkbox.
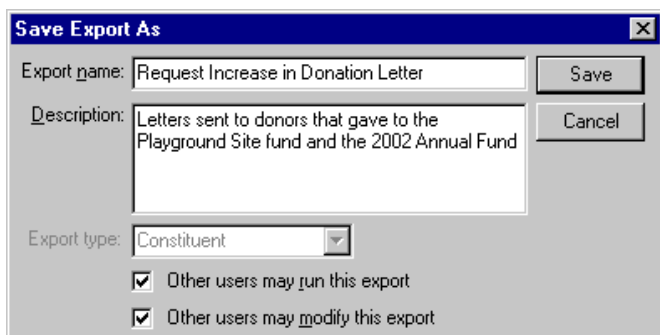
45. Click **Save**. The export record is saved and appears in the list on the Export page.

Create a Conditional Mail Merge in Mail

Note: If you have existing conditional mask documents, mail merge data files, and form letters, you can continue to use the files using the old process. You can also cut and paste the old data into a document formatted using the new formats, converting the old document. However, we recommend the next time you need to create a new conditional mail merge, take advantage of the quick and easy steps within *The Raiser's Edge*. Every step of the old process (which can be complicated) is included when you generate the Microsoft Word Mail Merge Wizard in *Mail*. The new *Word* integration process eliminates the risk of missing procedures using the old process and saves you time.

You can create conditional mail merges to retrieve specific information from your database and use the information with a *Word* letter to create multiple custom letters for your organization. A conditional mail merge combines one data file (exported from *The Raiser's Edge*) and a series of form letters (created in *Word*). In addition, a conditional mail merge also contains a mask document (also created in *Word*). The mask document contains the conditional statements used to select the form letter the record in the data file receives.

You can create conditional mail merges in the following mail tasks: Appeal Cards, Donor Acknowledgement Letters, Follow-up Letters, Honor/Memorial Acknowledgement Letters, Membership Cards, Quick Letters, Receipts, Reminders, Renewal notices, and Volunteer Follow-up Letters. There are many examples of when to create conditional mail merges in *Mail*. You can create a conditional mail merge to send specific appeal cards based on the appeal the constituent is receiving or to send a specific reminder based on the date a pledge was made. You can also create a conditional mail merge in Donor Acknowledgement letters to send a specific letter to a donor based on the fund to which she donated.

▶ **Select records for a conditional mail merge in Mail**

In this example, a letter is being sent to donors based on the fund to which they made a donation. You can apply the steps in this procedure to any conditional mail merge you need to create in *Mail*.

Note: This chapter explains how to select parameters from the most important tabs in *Mail* for completing a mail merge. These tabs are the General and Fields to Include tab. For information about selecting parameters from the Filters, Gift Types, Attributes, Ind. Address, Org. Address, Postal, and Format tabs, see the *Mail Guide*.
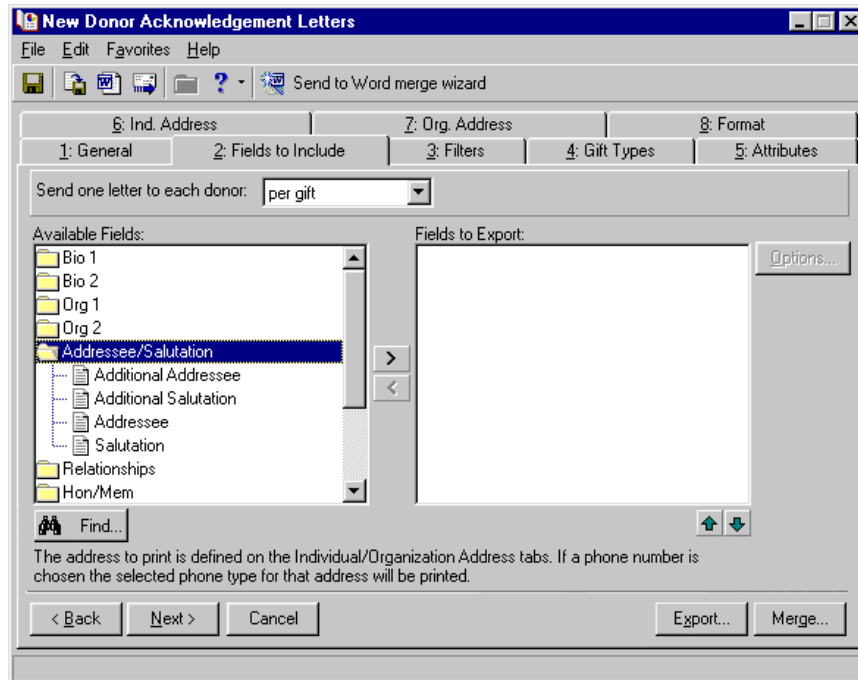
1. On the Raiser's Edge bar, click **Mail**.

2. From the list on the left, highlight the Donor Acknowledgment Letters mail task.

3. To create a new Donor Acknowledgment mail merge, click **New** on the action bar. The New Donor Acknowledgement Letters screen appears.

Note: If you select **All Records**, you consider all records found in your database for the export. If you choose **Selected Records**, you must use a query. If you select **One Record**, you locate and use a specific record in your database.

4. To select the specific records to include in the mailing, click **Include** and choose **Selected Records**. The Open Query screen appears for you to select the query you want. For more information about opening queries, see the *Query & Export Guide*.

5. In the **Date to use** field in the **Include Gifts with these Dates** frame, select "Gift date" because you are basing the record selection on when the gift was received.

Tip: You can also select "Last week", which refers to the previous Sunday through Saturday.

6. In the **Date** field, select "Today".

7. For this example, leave the defaults for the checkboxes and options in the **Soft Credit Gifts To**, **Include these Constituents**, and **Credit Matching Gifts To** frames. For more information about these frames, see the *Mail Guide*.

Note: An output query is a static query of all records included in a mailing. You can choose either a constituent or a gift query. A constituent query is based on constituent records. A gift query includes gift records. For example, when printing acknowledgement letters for a group of donors, you can create an output query containing the names of all constituents who received an acknowledgement letter. Later, you can use this query to print address labels or envelopes to mail with the letters. For more information about queries, see the *Query & Export Guide*.

8. Leave the **Create output query** checkbox unmarked. To create an output query of records included in this mailing for possible future use, at the bottom of the General tab, you can mark the **Create output query** checkbox. The corresponding field becomes enabled.

To learn about selecting fields for a conditional mail merge in Mail, see "Select fields for a conditional mail merge in Mail" on page 63.

▶ **Select fields for a conditional mail merge in Mail**

Once you select the records you need for your conditional mail merge, select the fields you need for your data file. For more information about selecting records for a conditional mail merge in *Mail*, see "Select records for a conditional mail merge in Mail" on page 60.

Note: This chapter explains how to select parameters from the most important tabs in *Mail* for completing a mail merge. These tabs are the General and Fields to Include tab. For information about selecting parameters from the Filters, Gift Types, Attributes, Ind. Address, Org. Address, Postal, and Format tabs, see the *Mail Guide*.

1. On the New Donor Acknowledgement Letters screen, select the Fields to Include tab.

Note: If you have default fields in the **Fields to Export** box, highlight the fields you do not want and click the left arrow to move the fields to the **Available Fields** box.

2. In the **Send one letter to each donor** field, select "per gift" to generate one letter for every gift donated.

Sometimes a constituent donates more than one gift that meets the criteria selected on the mail task. In the **Send one Letter to each donor** field, you need to select whether to send one letter for each gift donated or one letter per constituent, regardless of the number of gifts each donated. If you choose "per gift", a constituent receives a letter for every gift donated. If you choose "per donor", each donor receives one letter summarizing all their gifts.

3. First, you are going to select the addressee for the letter. The addressee is the constituent's name, however you wish to format it, that accompanies his address at the top of the letter. From the **Available Fields** box, double-click the folder next to **Addressee/Salutation**. The fields available for this category appear.


Note: If you highlight a folder in the **Available Fields** box and click the right arrow, you move every field available in this folder to the **Fields to Export** box.

4. Under the **Addressee/Salutation** folder, highlight **Addressee** and click the right arrow. The Customization Options for Addressee screen appears.

Note: For more information about defining formats for Addressees/Salutations, see the Configuration chapter of the *Configuration & Security Guide*.

5. In the **Addressee/Salutation To Use** frame, select **From individual**. You want to select the specific format to use for the addressee, which you have established on the donor's record.

6. In the **Use this addressee/salutation if present on the Individual** field, select "Primary Addressee". In the **Otherwise use** field, select <Full Name>.

The name format you choose for **Addressee** will appear with the constituent's address at the top of the letter.

7. Click **OK**. You return to the New Donor Acknowledgement Letters screen.

8. In the **Addressee/Salutation** folder, highlight **Salutation** and click the right arrow. The Customization Options for Salutation screen appears.

9. In the **Addressee/Salutation To Use** frame, select **From individual**.

10. In the **Use this addressee/salutation if present on the Individual** field, select "Primary Salutation". In the **Otherwise use** field, select <Full Name>. You want to use the Primary Salutation you have stored on the donor's record. If this option is not present, you want to use the constituent's full name as the salutation for your letter.

The name format you choose for **Salutation** will appear after the "Dear" in the letter.

11. Click **OK**. You return to the New Donor Acknowledgement Letters screen.

In the **Fields to Export** box, **Addressee/Salutation.Addressee** and **Addressee/Salutation.Salutation** now appear. To make any changes to your selections, highlight one and click the **Options** button on the right.

Tip: It is not necessary to select fields in the exact order you want them to appear in the letters, but it is helpful.

12. You are now ready to select your address for the letter. In the **Available Fields** box, double-click the folder next to **Address**. The fields available for this category appear.

13. Highlight Address line 1 and click the right arrow. Address.Address line 1 appears in the **Fields to Export** box.

If you select Address Block, all address data exports in one field.

14. Repeat this step for City, State, and ZIP Code so they all appear in the **Fields to Export** box.
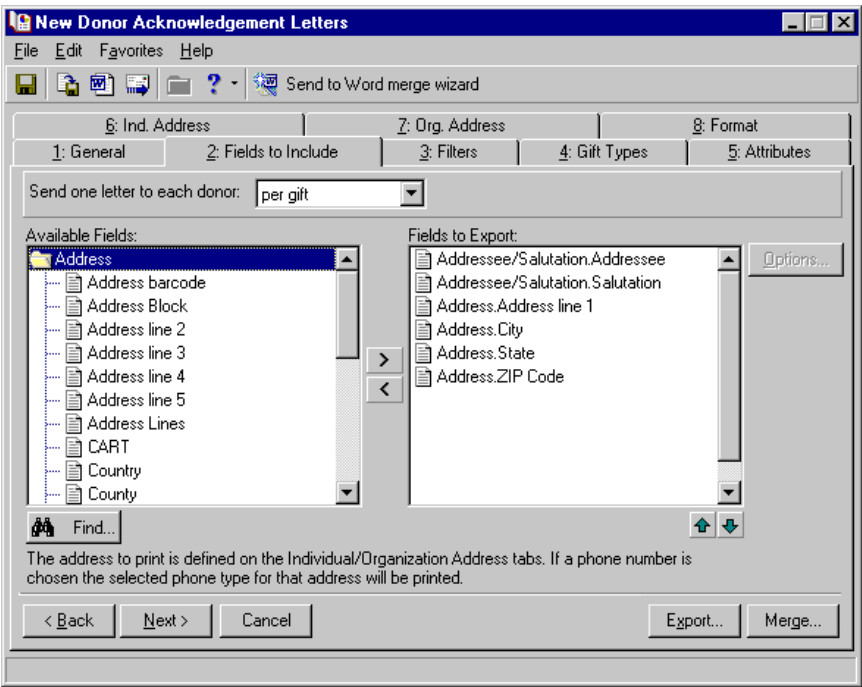
15. Next, you will select gift information to include in the letter. From the **Available Fields** box, double-click the folder next to **Gifts**. The fields available for this category appear.
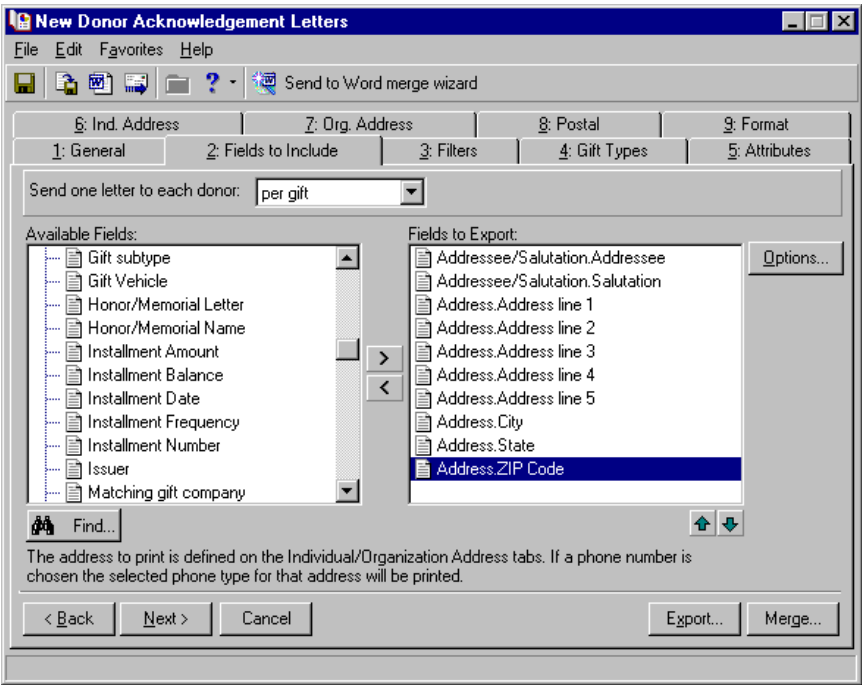
16. Double-click **Gift date**. The Field Options screen appears.
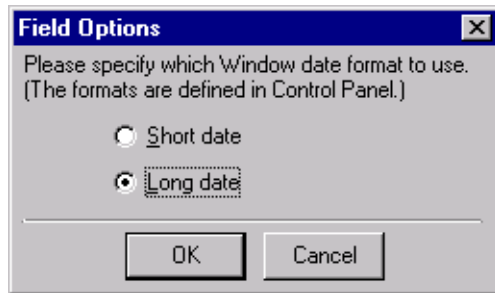
17. Because you want the gift date to appear as "Monday, December 09, 2002" in your letters, select **Long date**.

18. Click **OK**. **Gifts.Gift date (Long date)** appears in the **Fields to Export** box.

19. Because you want the gift amount to appear in the body of the letter, in the **Available Fields** box, double-click **Amount**. **Gifts.Amount** appears in the **Fields to Export** box.

20. Because you want the fund to which the gift was donated written out in the letter, in the **Available Fields** box, double-click **Fund description**. The Field Options screen appears.

Note: This chapter explains how to select parameters from the most important tabs in *Mail* for completing a mail merge. These tabs are the General and Fields to Include tabs. For information about selecting parameters from the Filters, Gift Types, Attributes, Ind. Address, Org. Address, Postal, and Format tabs, see the *Mail Guide*.

21. In the **Number of Fund description fields to export** field, enter "1" to include only one fund description per gift in your mailing.

Including only one fund description per gift does not mean you are only considering gifts given to one fund. This means that for every gift you include in your mailing, you want to include the description of only one fund, instead of three fund descriptions. For example, for a gift that was split between three funds, the name of only one of those funds appears in the letter.

22. Click **OK**. **Gifts.Fund description (1)** appears in the **Fields to Export** box.

This chapter explains how to select parameters from the most important tabs in *Mail* for completing a mail merge. These tabs are the General and Fields to Include tabs. For information about selecting parameters from the Filters, Gift Types, Attributes, Ind. Address, Org. Address, Postal, and Format tabs, see the *Mail Guide*.

To learn about creating a conditional mail merge in Mail, see "Create a conditional mail merge in Mail" on page 70.

▸ **Create a conditional mail merge in Mail**

Once you have selected the records and fields you need for your conditional mail merge, you can begin creating your mail merge. For more information about selecting the records you need, see "Select records for a conditional mail merge in Mail" on page 60. For more information about including fields for your data files, see "Select fields for a conditional mail merge in Mail" on page 63.

1. Once you complete selecting the parameters for your simple mail merge, click **Send to Word merge wizard**. The Save Mailing As screen appears.
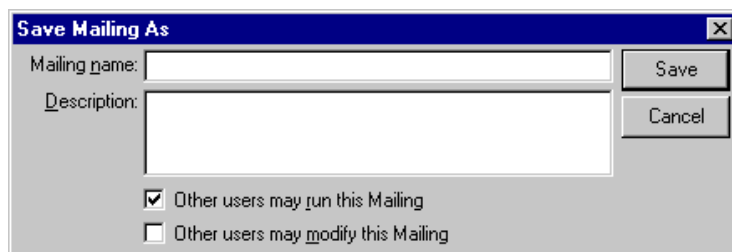
2. In the **Mailing name** field, enter "Gift Acknowledgement Letters for May 2002".

3. In the **Description** field, enter any additional information you want. For example, you can enter "May letters are a conditional mail merge."

4. If you want to authorize other users to run your mailing, mark the **Other users may run this Mailing** checkbox.

5. If you want to authorize other users to change your mailing, mark the **Other users may modify this Mailing** checkbox.

Warning: If you have a version of Microsoft *Word* prior to *Word 2000*, you can see the integration options, but you cannot perform an integrated mail merge using ***The Raiser's Edge***. To take full advantage of the enhanced features, you must have *Word 2000*, *XP*, *2003*, *2007*, or *2010* installed on your computer.

6. Click **Save**. The Microsoft Word Mail Merge Wizard appears.

7. Click **Next**. A message appears, asking if you want to mark the gifts as Acknowledged.

Warning: Once the gifts are marked as "Acknowledged", you cannot produce another acknowledgement letter for them unless you change the field back to "Not Acknowledged". This can be done manually or through **Globally Change Records** in *Administration*. For more information, see the *Global Add, Delete, & Change Records Guide*.

8. To automatically update the **Acknowledge** field on the gift records in the export from "Not Acknowledged" to "Acknowledged", click **Yes**. This helps you keep your records up-to-date.

   To prevent the program from automatically changing the **Acknowledge** field on the gift records from "Not Acknowledged" to "Acknowledged", click **No**.

   The next step of the Blackbaud Word Mail Merge Wizard appears.

9. To process a conditional mail merge, select **Perform a conditional mail merge using multiple documents**.
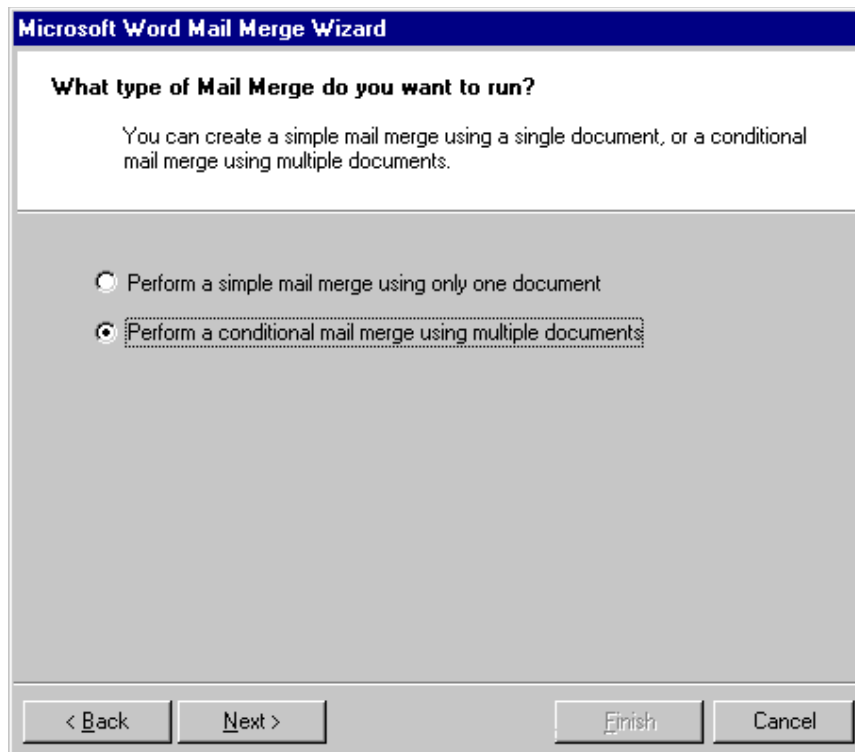
10. Click **Next**. The Choose your conditional field screen appears.
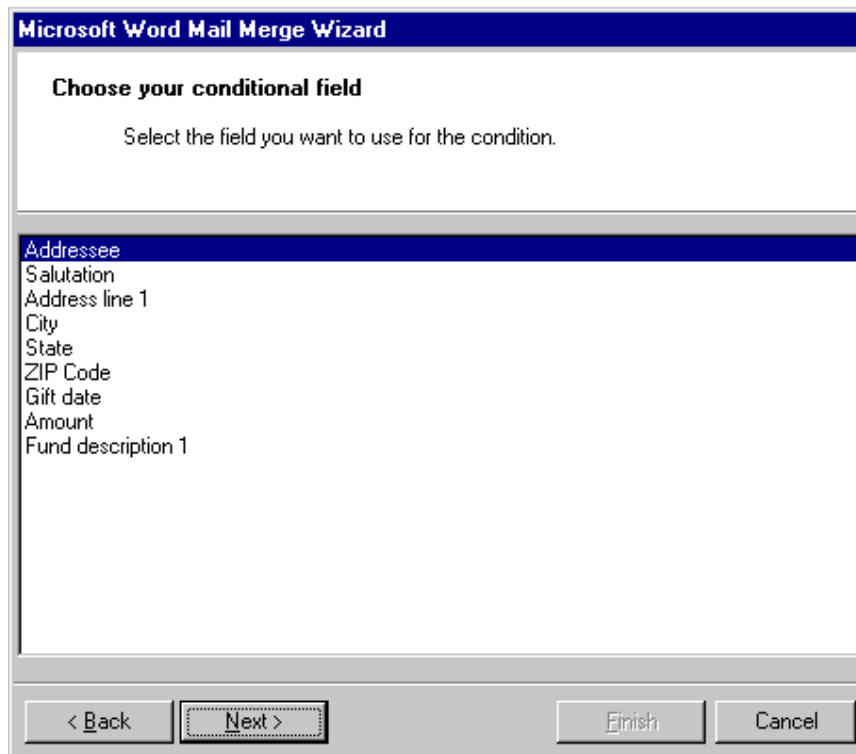
The mask document is the *Word* document that contains a conditional statement used in the conditional mail merge This statement determines the letter each record in the data file receives.

11. Highlight the field on which you want your conditional mail merge to be based for the mask document.

For example, you are sending letters to every donor who has given to the Playground Site fund or the 2002 Annual Fund to encourage them to donate again. For your conditional mail merge, you want to request that if a donor gave to the Playground Site fund, he receives Letter A. If a donor gave to the 2002 Annual Fund, he receives Letter B. To get the results you need using this example, base the conditional field on **Fund Description**.

12. Click **Next**. The Create the document and merge the data screen appears.
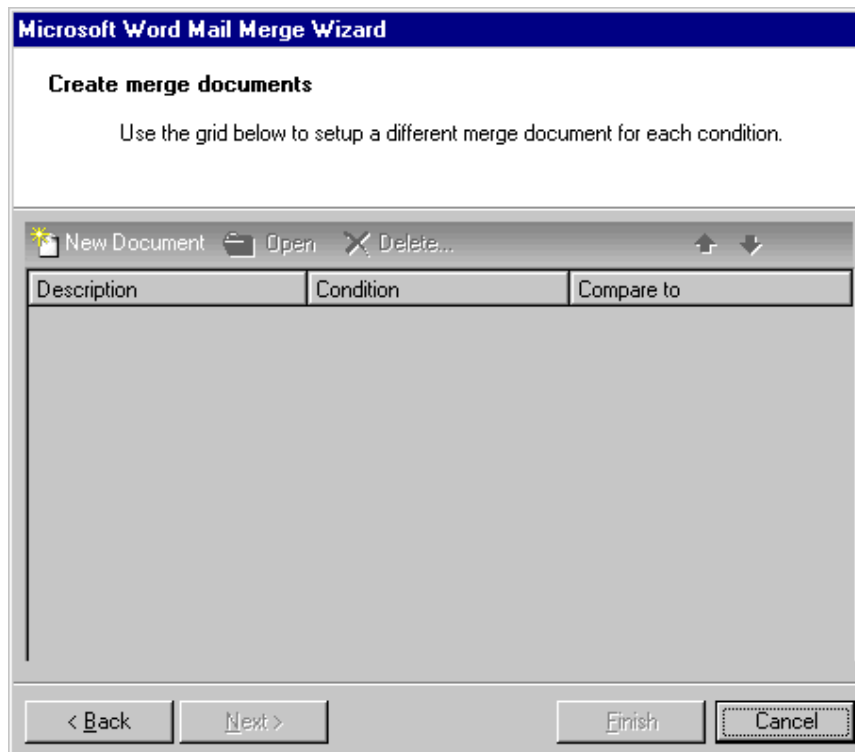
A form letter is a *Word* document containing the text you want to repeat in each letter.

13. To create your first form letter for the conditional merge, click **New Document** on the action bar. The Conditional Merge Document screen appears.
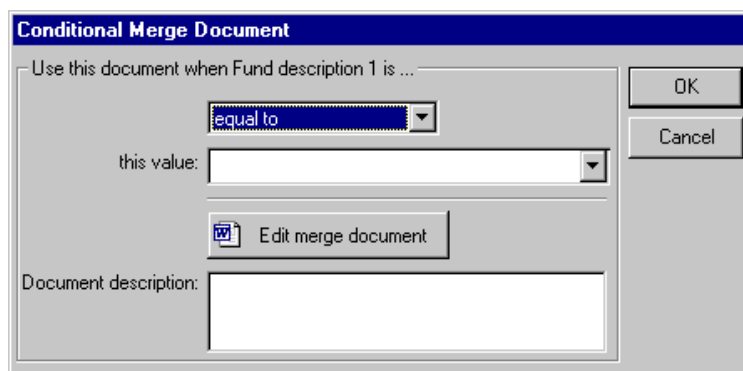
14. In the **Use this document when Description is** frame, leave the default operator "equal to".

15. In the **this value** field, enter "Playground Site".

16. Click **Edit merge document**. *Word* opens to a new screen automatically for you to create your form letter.
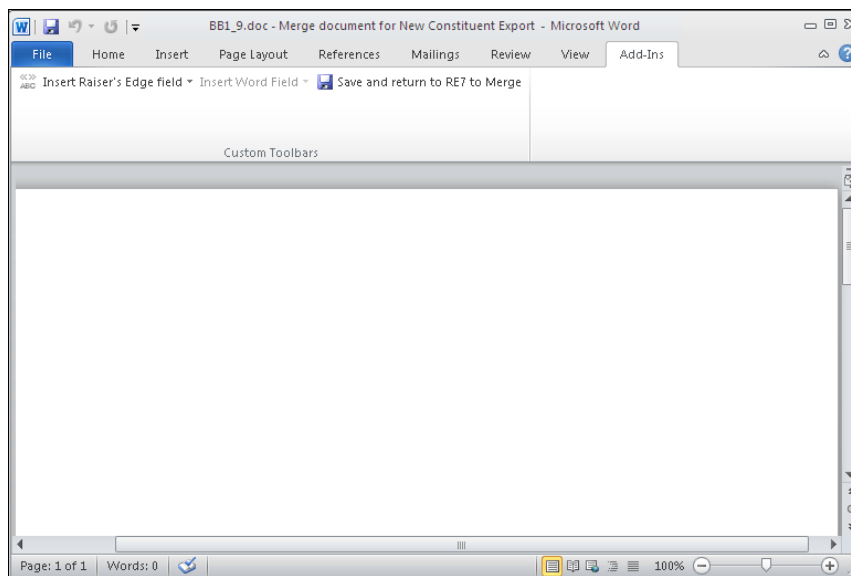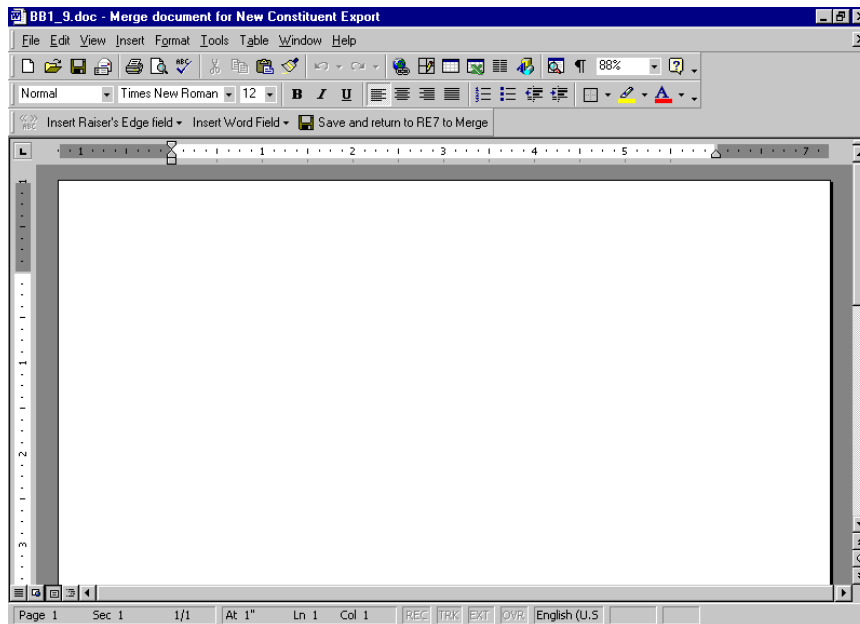
17. Click **Insert Raiser's Edge field** on the toolbar. A list of the fields in the data file appears.

For Microsoft *Word 2007* and *2010*, the **Raiser's Edge** toolbar appears on the Add-Ins tab of the Microsoft *Word* ribbon.
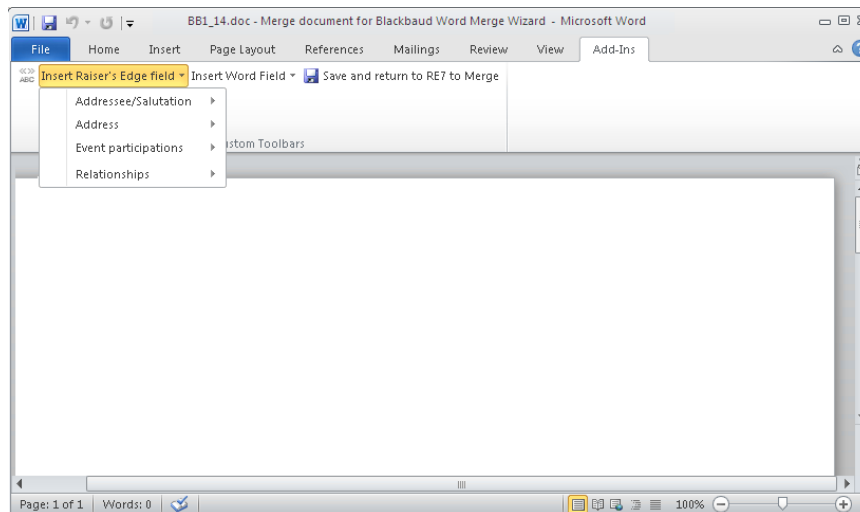
18. To place a field in the form letter, place your cursor where you want the field in *Word*.

19. Click the field you need from the **Insert Raiser's Edge field** list to add the field.

Note: By selecting **Tools**, **Spelling and Grammar** from the menu bar, you can make sure you do not have spelling mistakes in your form letter. You can also search for a different word to use, with the same meaning, by selecting **Language**, **Thesaurus** from the **Tools** menu bar. You can find similar *Word* integration on Notepad screens in *The Raiser's Edge*. On a Notepad screen, you can press **F7** on your keyboard; select **Tools**, **Spelling** from the menu bar; or click the **Spelling** button on the toolbar to spell check your note. You can press **SHIFT** + **F7** on your keyboard or select **Tools**, **Thesaurus** from the menu bar to access the thesaurus.

20. As you write your form letter, repeat these steps to continue placing the fields you want in the letter.

21. To return to *Mail* to continue the conditional mail merge process, click **Save and return to RE7 to Merge**. You return to the Conditional Merge Document screen.

22. In the **Document description** box, enter any specific information for the form letter you want. For example, you can add that you requested a 10 percent increase in donation.

Note: The **Compare to** column is useful for determining which letter a constituent should receive when both letters apply to the constituent. For example, Allison Andrews gave to both the Playground Site fund and the 2002 Annual Fund. By using the up and down arrow buttons above the **Compare to** column, you can highlight the letter you want to send to Allison.

23. Click **OK**. You return to the Create merge documents screen and the first form letter appears in the grid.

Note: If a gift meets more than one condition, *The Raiser's Edge* selects the first condition that is met. For example, Mark Smith donated two gifts, one to the Playground Site fund and one to the 2002 Annual Fund. In this procedure, the condition fund equals Playground Site is the original condition. Therefore, Mark Smith receives a letter for the Playground Site fund.

24. To continue with your second form letter, click **New Document**.The Conditional Merge Document screen appears.
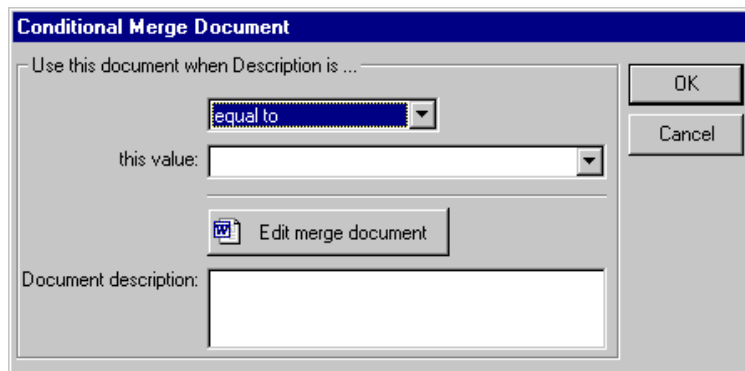
25. After you create your last form letter for the conditional mail merge, click **Next** on the Create merge documents screen. The Select a file name screen appears.

Create this form letter using the same steps you completed to create the first form letter. Continue to add the rest of the form letters you need for inclusion in your conditional mail merge.
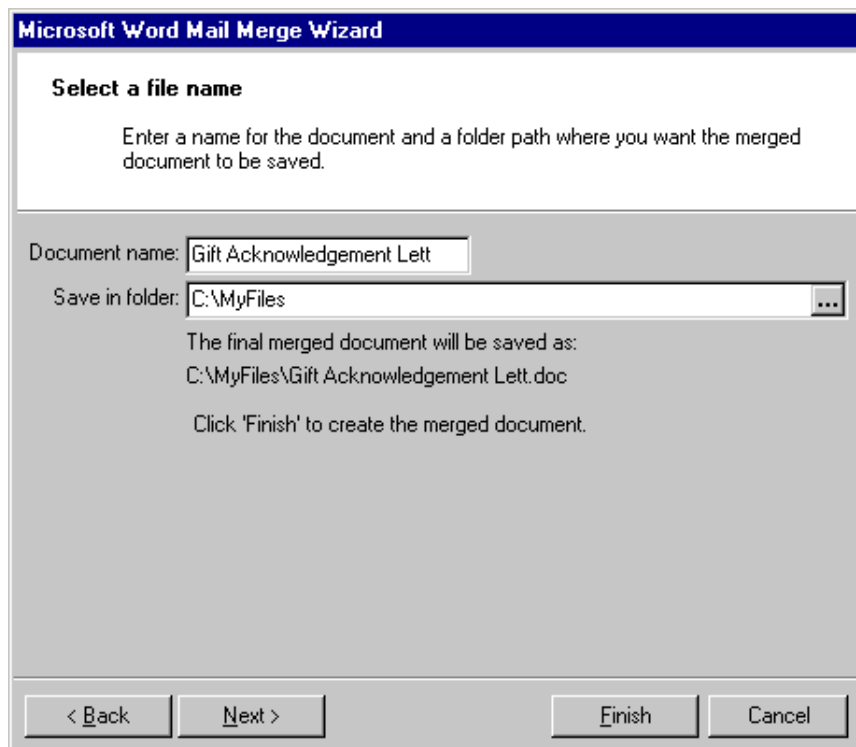
26. In the **Document name** field, enter a name for the document.

27. In the **Save in folder** field, enter the path to where you want the merged document saved.

28. Click **Finish**. Word creates and save the document.

Tip: To quickly and easily merge letters again from a saved mail task in *Mail*, click **Execute Word Merge** on the toolbar or **Merge** in the lower right corner of the mail task screen. The Confirm File Location screen appears so you can select a location to save the merged letters. After you click **OK**, the mail merge process begins. When complete, your merged letters appear automatically in *Word*.

Your merged letters appear automatically in *Word*.
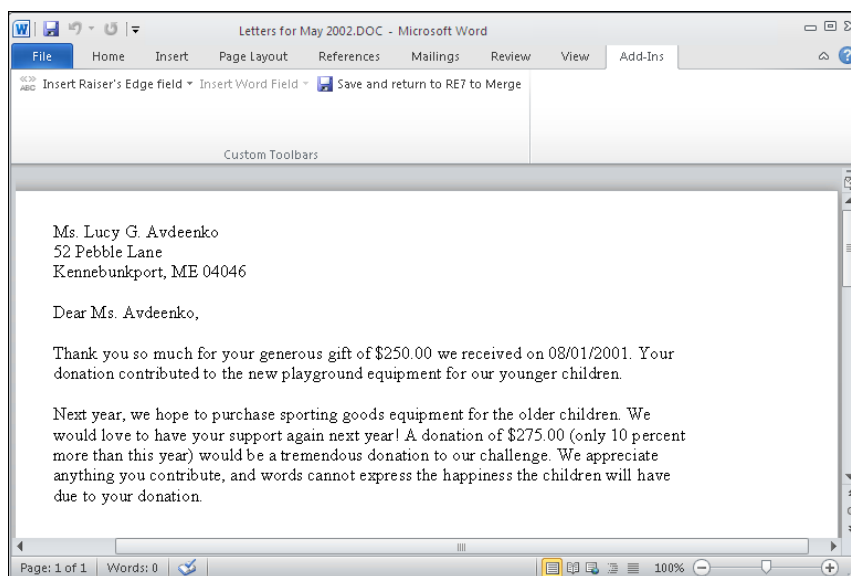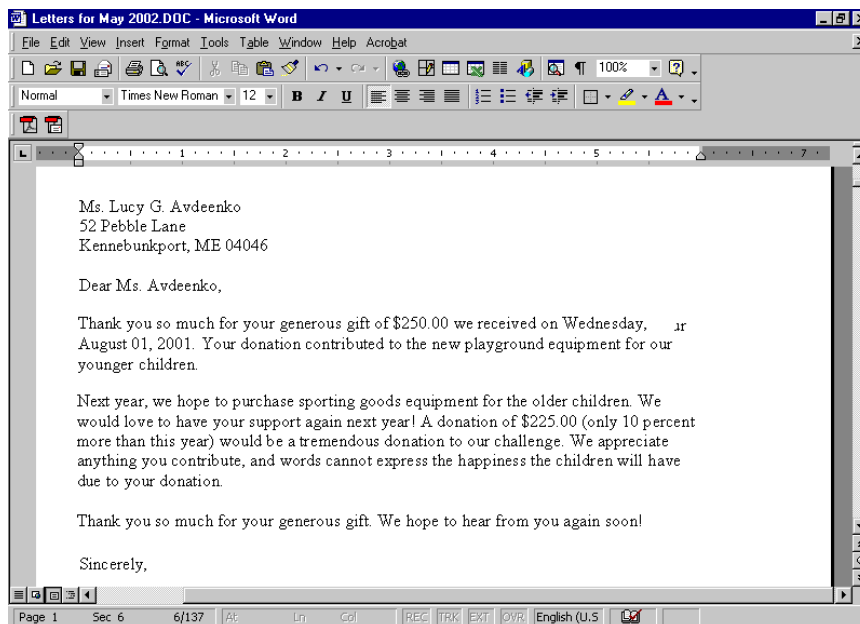
Note: If you want to print the letter, select **File**, **Print** from the menu bar.

29. To close *Word*, select **File**, **Exit** from the menu bar. You return to *Mail*.

30. To close the mail task, select **File**, **Close** from the menu bar.

Edit a Mail Merge Task in Export

To edit a letter for a simple mail merge or a conditional mail merge in *Export*, complete the same steps for editing the mail merge. It is important to remember to save the *Word* document with a new name so you do not overwrite any existing letters you saved.

‣ **Edit a mail merge task in Export**

In this procedure, we edit the simple mail merge document for *Export*. Follow the same steps for a conditional mail merge in *Export* to complete the steps to edit mail merges.

1. From your saved export screen, click **Edit merge document** on the toolbar. For more information about opening an existing export record, see the Export chapter in the *Query & Export Guide*.
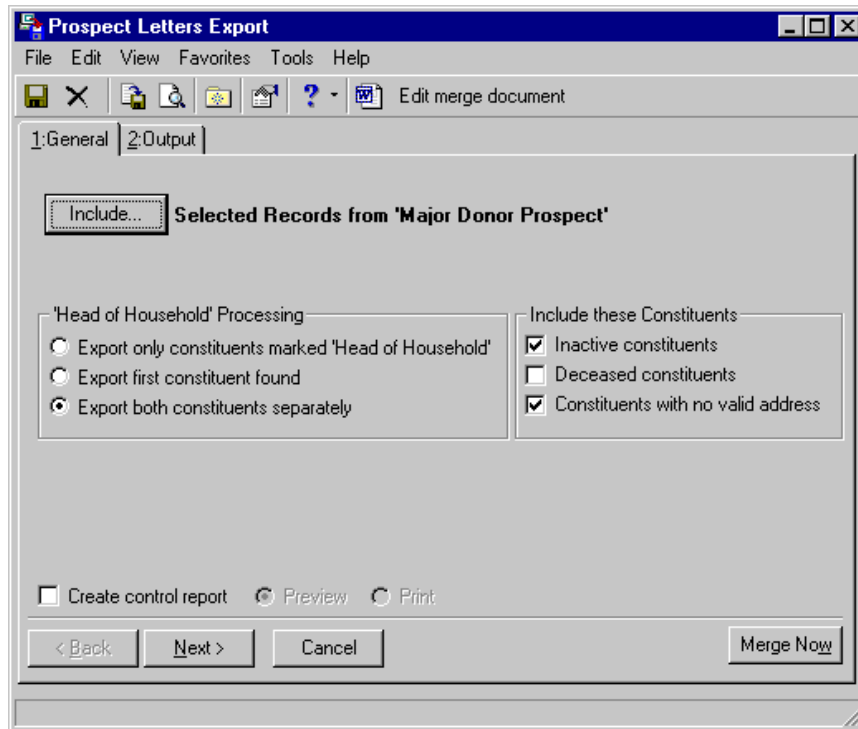
Word opens and your form letter appears.
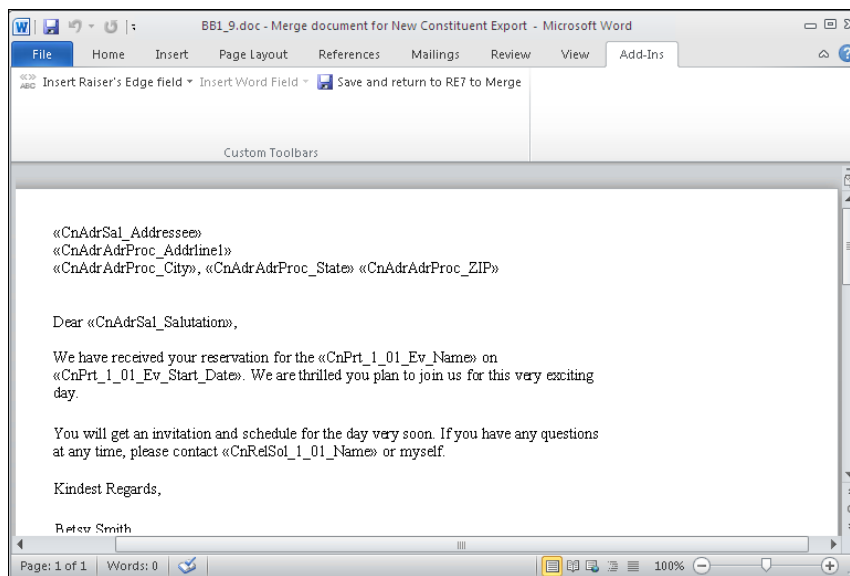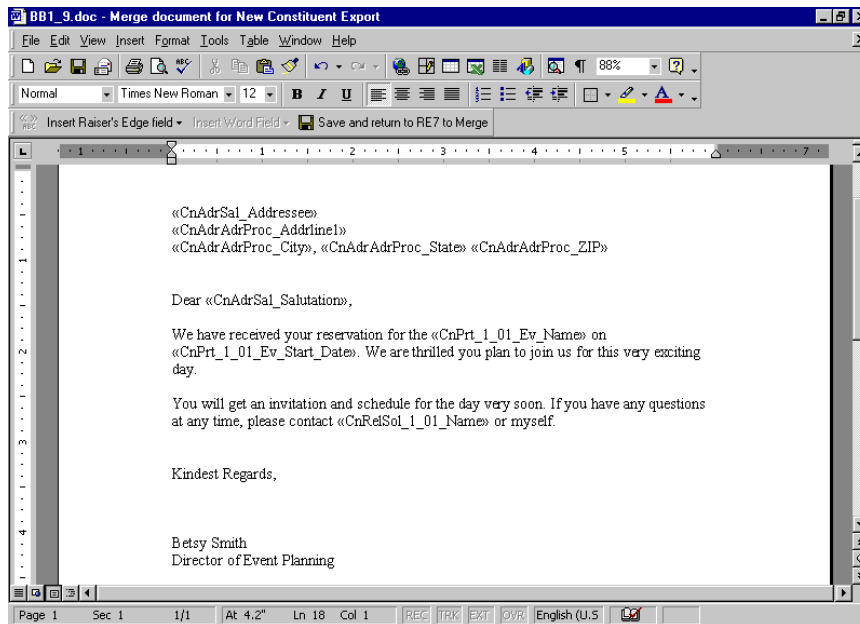
2. Make the changes you want to the form letter.

3. Click **Save and Return to RE7 to Merge**. You return to Export.
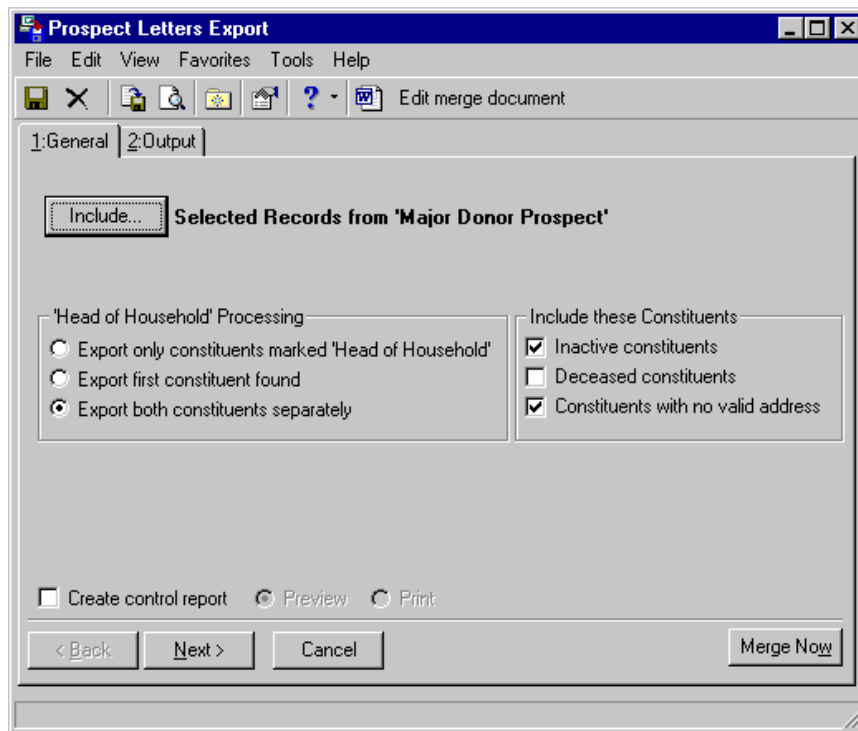
Note: If you want to edit your form letter only and do not want to generate the merge letters again, click **Save** on the toolbar. Select **File**, **Close** from the menu bar to close the export record.

4. To begin the mail merge, click **Merge Now**. The Export file name screen appears.
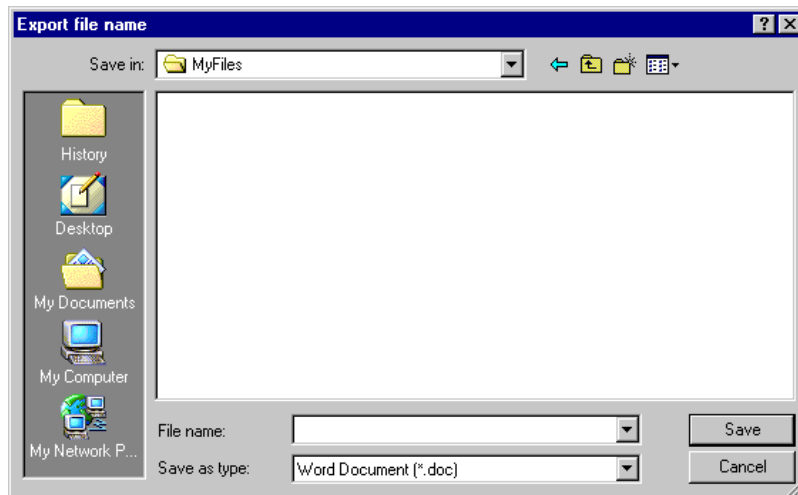
5. In the **Save in** field, assign a location to your data file. For example, you may want to save this to C:\MyFiles, or another folder in which you prefer to store information.

6. In the **File name** field, enter "EventScheduleLetters.doc" to name the data file for the export.

7. The value in the **Save as type** field defaults to the export type you selected on the Create a New Export screen.
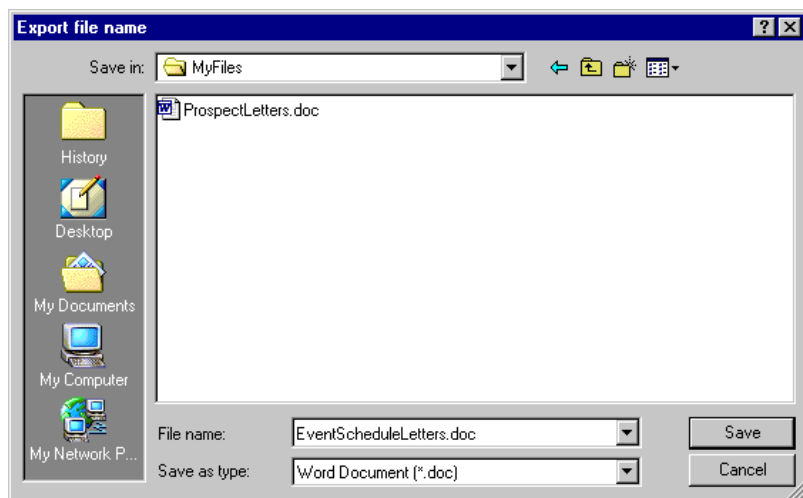
8. Click **Save**. The mail merge processes, and a processing screen appears.
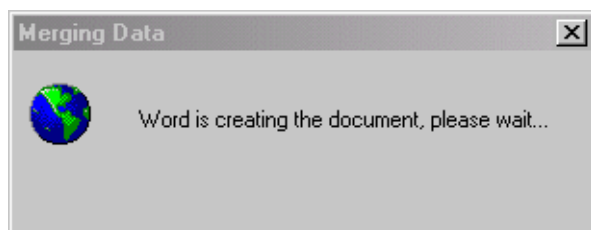
Your merged letters appear automatically in *Word*.
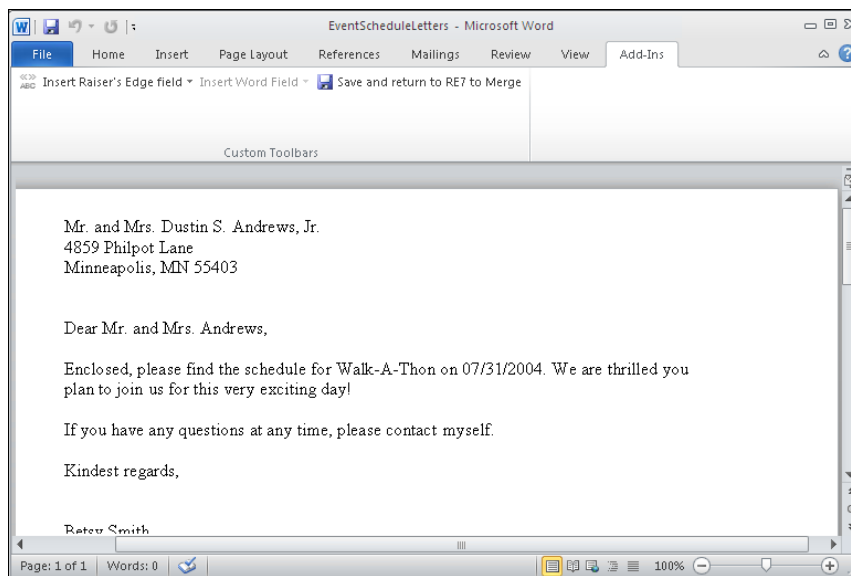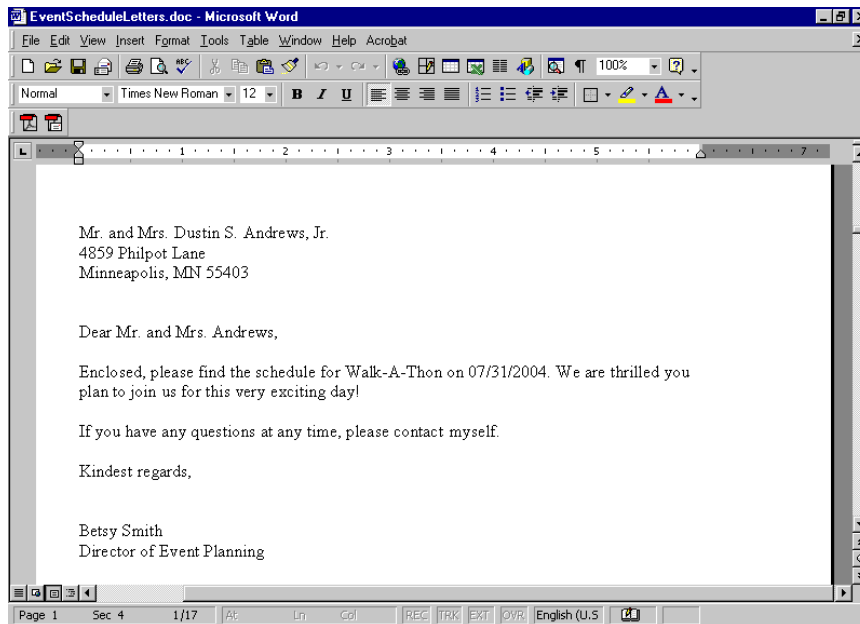
Note: If you want to print the letter, select **File**, **Print** from the menu bar.

9. To close *Word*, select **File**, **Exit** from the menu bar. You return to *Export*.
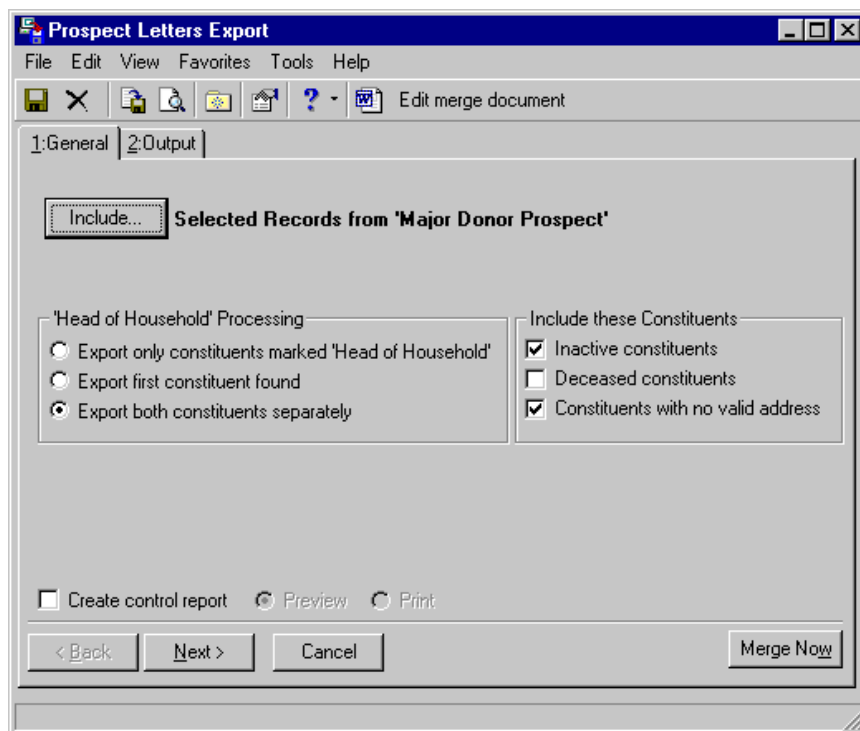
10. To save and close *Export*, select **File**, **Close** on the menu bar.

Edit a Mail Merge Task in Mail

To edit a letter for a simple mail merge or a conditional mail merge in *Mail*, complete the same steps for editing the mail merge. It is important to remember to save the *Word* document with a new name so you do not overwrite any existing letters you saved.

▸ **Edit a mail merge task in Mail**

Note: You can edit mail merge tasks for Appeal Cards, Follow-up Letters, Honor/Memorial Acknowledgement Letters (with *Honor/Memorial Tracking*), Membership Cards (with *Membership Management*), Quick Letters, Receipts, Reminders, Renewal notices (with *Membership Management*), and Volunteer Follow-up Letters (with *Volunteer Management*) in *Mail*.

In this procedure, we edit the simple mail merge document for a Donor Acknowledgement Letter mail task in *Mail*. Follow the same steps for a conditional mail merge in *Mail* to complete the steps to edit mail merges.

1. From your saved mail task screen, click **Send to Word merge wizard** on the toolbar. For more information about opening an existing mail task, see the *Mail Guide*.
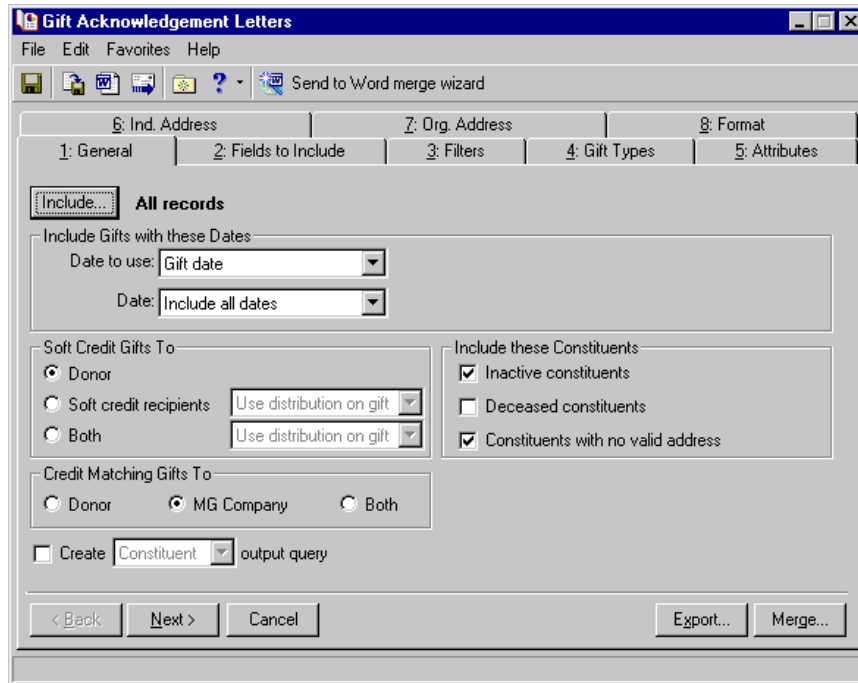

The Microsoft Word Mail Merge Wizard appears.
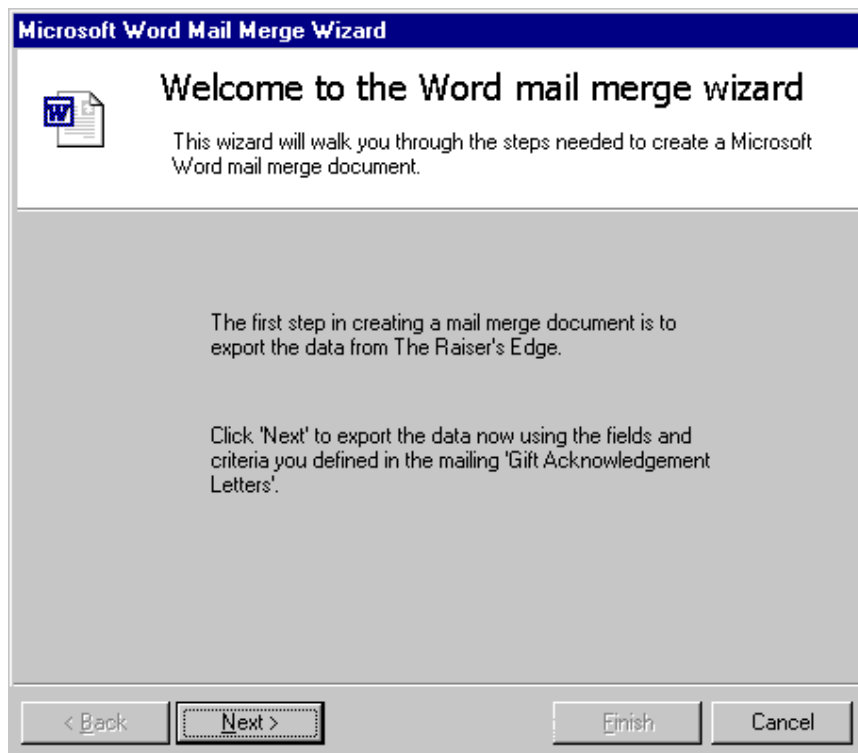
Warning: If all the gift records are marked "Acknowledged" for the mail task parameters you select, a message appears stating that no records meet the criteria for the task. To edit an existing mail merge letter in *Mail*, you must have gift records to export marked "Not Acknowledged".

2. Click **Next**. A message appears asking if you want to mark the gifts as Acknowledged.
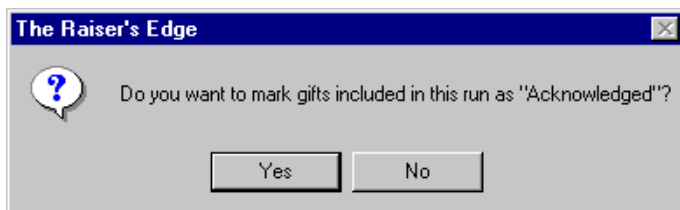
3. To automatically update the **Acknowledge** field on the gift records in the export from "Not Acknowledged" to "Acknowledged", click **Yes**. This helps you keep your records up-to-date.

Warning: Once the gifts are marked as "Acknowledged", you cannot produce another acknowledgement letter for them unless you change the field back to "Not Acknowledged". This can be done manually or through **Globally Change Records** in *Administration*. For more information, see the *Global Add, Delete, & Change Records Guide*.

To prevent the program from automatically changing the **Acknowledge** field on the gift records from "Not Acknowledged" to "Acknowledged", click **No**.
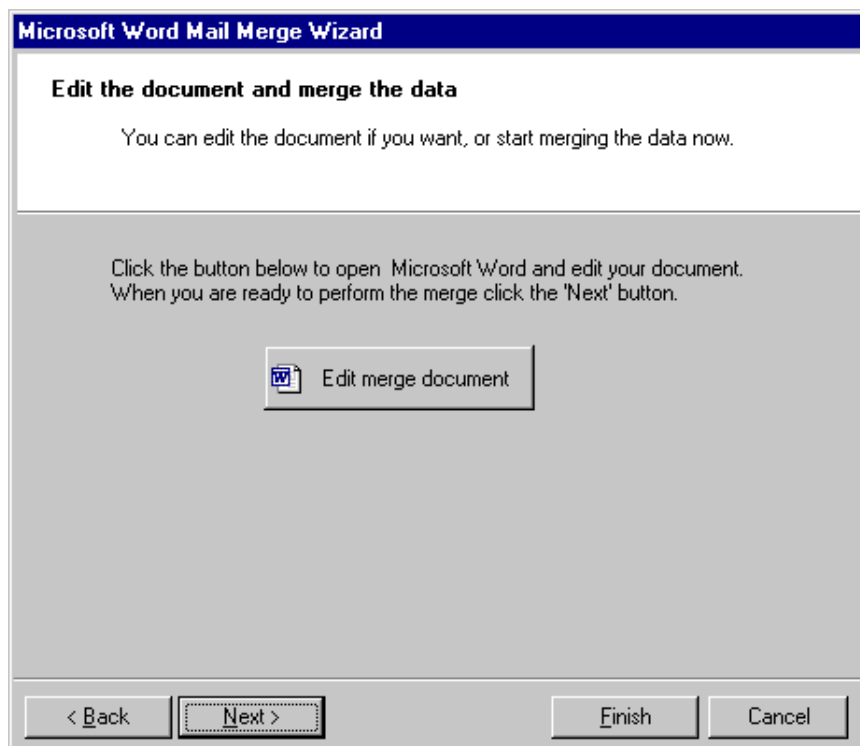
The next step of the Blackbaud Word Mail Merge Wizard appears.

Note: To process an existing conditional mail merge, select **Perform a conditional mail merge using multiple documents**.
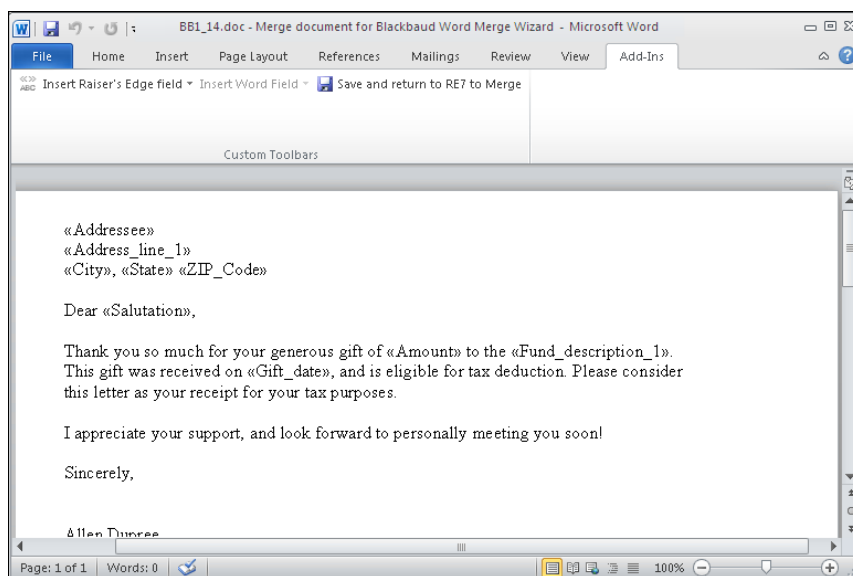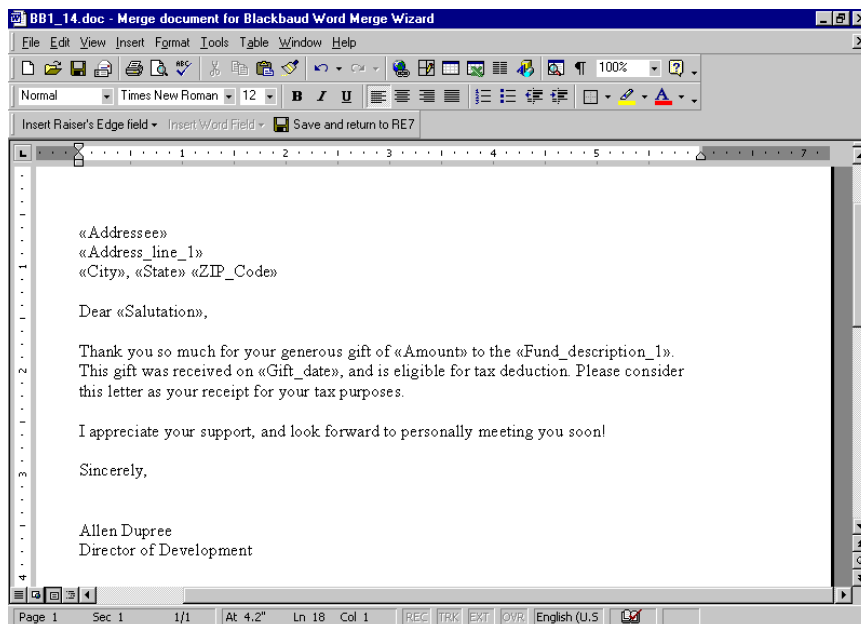
4. To process an existing simple mail merge, select **Perform a simple mail merge using only one document**.
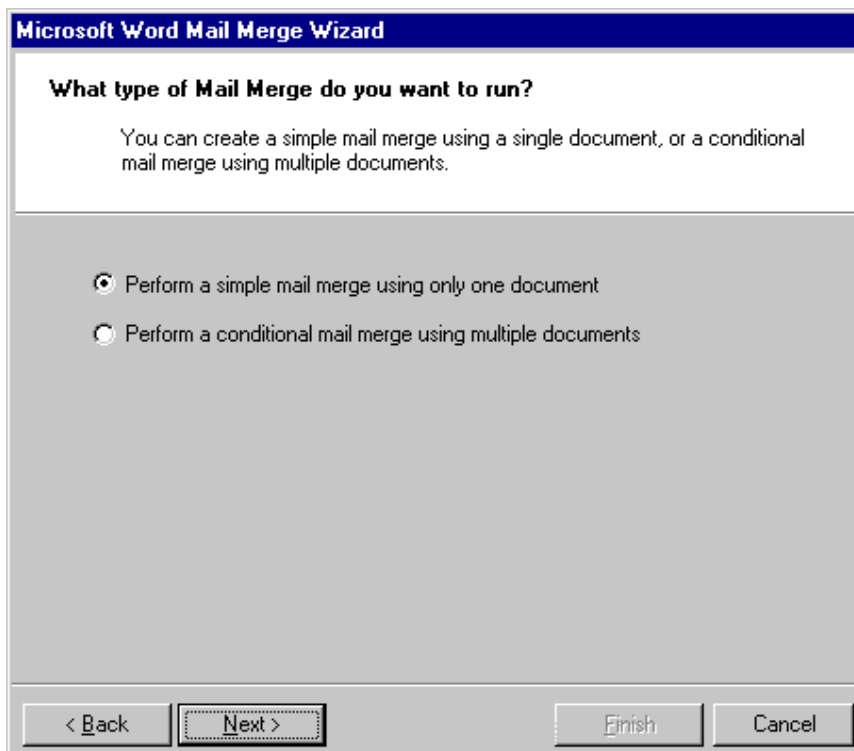
5. Click **Next**. The Edit the document and merge the data screen appears.

6. Click **Edit merge document**. *Word* opens and your form letter appears.


7. Make the changes you want to the form letter.

Note: If you want to edit your form letter only and do not want to generate the merge letters again, click **Cancel** on the Microsoft Word Mail Merge Wizard. You return to the mail task screen. To save the changes, click **Save** on the toolbar. Select **File**, **Close** from the menu bar to close the mail task.

8. To return to *Mail* to continue the mail merge process, click **Save and return to RE7**. You return to the Microsoft Word Mail Merge Wizard screen.

9. Click **Next**. The wizard screen appears so you can save your *Word* mail merge.
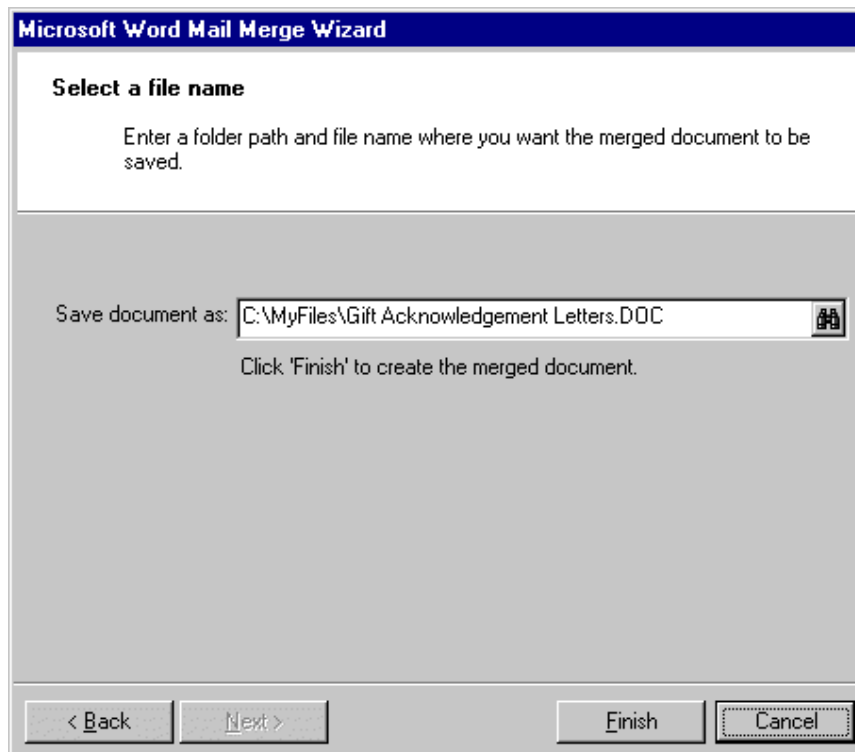
10. To browse for a location on your computer where you want to save the document, click the binoculars. If you do not want to overwrite your existing document, rename your .doc file.

Tip: To quickly and easily merge letters again from a saved mail task in *Mail*, click **Execute Word Merge** on the toolbar or **Merge** in the lower right corner of the mail task screen. The Confirm File Location screen appears so you can select a location to save the merged letters. After you click **OK**, the mail merge process begins. When complete, your merged letters appear automatically in *Word*.

11. Click **Finish**. The simple mail merge begins processing. When complete, your merged letters appear automatically in *Word*.
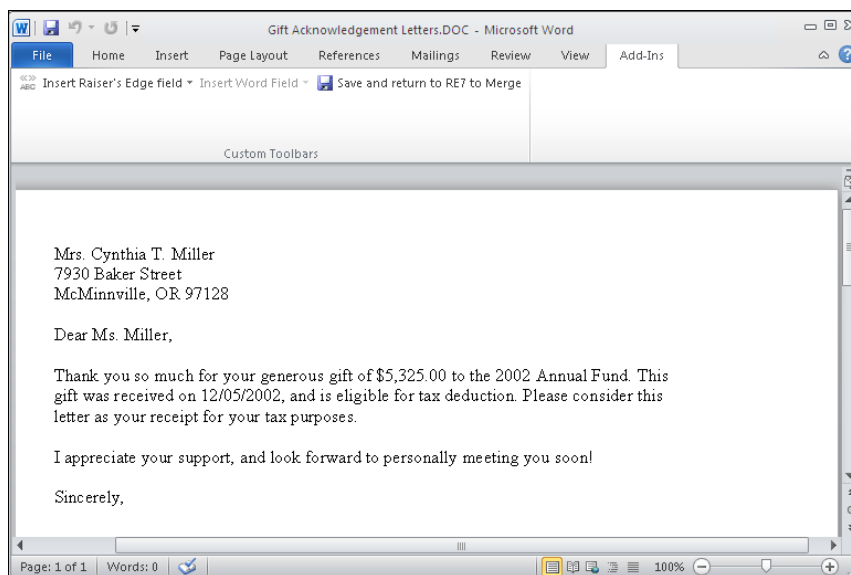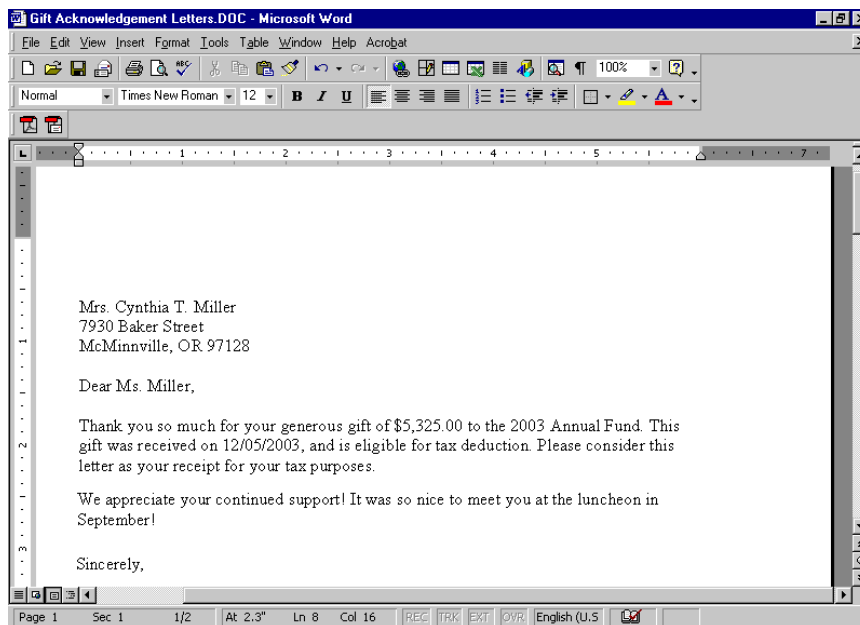
Note: If you want to print the letter, select **File**, **Print** from the menu bar.

12. To close *Word*, select **File**, **Exit** from the menu bar. You return to the mail task screen.

13. To close the mail task and return to the Mail page, select **File**, **Close** from the menu bar.

Create a Letter from a Constituent Record

Note: On the Letters page, accessed from the **Letters** link of *Configuration*, you can set up the letters you use at your organization. You can create merge documents from **The Raiser's Edge**, link letters you create from Microsoft *Word* to **The Raiser's Edge**, and edit your merge fields. For more information about the **Letters** link of *Configuration*, see the *Configuration & Security Guide*.

In **The Raiser's Edge**, if you use Microsoft *Word*, you can create a single letter from an individual or organization constituent record, using the **Letter** menu. To create a customized letter from a constituent record, you can select the merge fields you want to export out of **The Raiser's Edge** to use within your letter, create the merge document, and select the letter from the **Letter** menu to automate the merge process. You can also quickly write a letter by selecting **Write a letter** from the **Letter** menu. A Word document appears with fields already selected for your letter. By using the **Letter** menu, you can quickly and easily print a single letter for a constituent while working in *Records*.

For example, your organization sends a letter of congratulations to constituents who become new parents. Ellyn and Derek Hassell, constituents in your database, recently had a baby boy. You want to immediately send a letter congratulating the couple on the birth of their son. Instead of creating a mailing for this one record in *Mail*, you can quickly generate the letter from the **Letter** menu of Derek's constituent record.

‣ **Create a new letter and generating a mail merge from the Letter menu of a constituent record**

Warning: If you have a version of Microsoft *Word* prior to *Word 2000*, you can see the integration options, but you cannot perform an integrated mail merge using **The Raiser's Edge**. To take full advantage of the enhanced features, you must have *Word 2000*, *XP*, *2003*, *2007*, or *2010* installed on your computer.

If you use Microsoft *Word*, you can create a letter from the **Letter** menu of an individual or organization constituent record. From the constituent record, you can create a merge document and select the merge fields you want to export out of *The Raiser's Edge* to use within your letter. Once you define the merge fields for a letter, you can automate the mail merge by selecting the letter from the **Letter** menu of a constituent record.

1. From a constituent record, select **Letter**, **Create a New Letter Format** from the menu bar.

Note: On the Letter screen, you can make a letter inactive by marking the **Letter is inactive** checkbox. The letter becomes inactive throughout *The Raiser's Edge*, and will also appear inactive on the Letters page, accessed from the **Letters** link of *Configuration*.
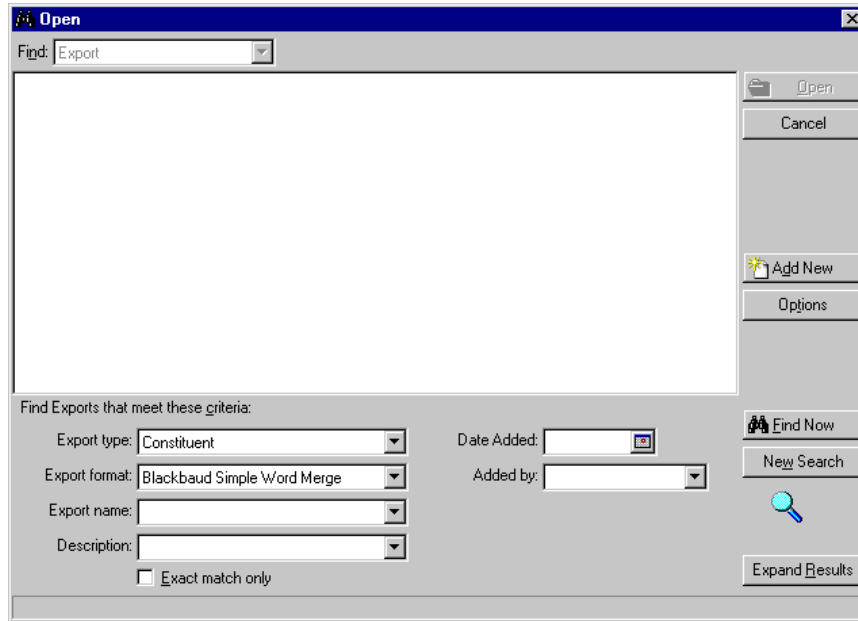
The New Letter screen appears.

2. In the **Letter description** field, enter the name or description of the letter.

Note: On the Letter screen, in the Export name field, you can also click the Add a New Blackbaud Word Merge Export button to bypass the Open screen.

3. In the **Export name** field, click the binoculars. The Open screen for exports appears.

Note: For more information about working with export files, see the Export chapter of the *Query & Export Guide*.

4. From the Open screen, you can search for an export file you already created and saved for a mail merge, or you can create a new export file for a mail merge. For this letter, create a new export file. Click **Add New**. The New Constituent Export screen appears.
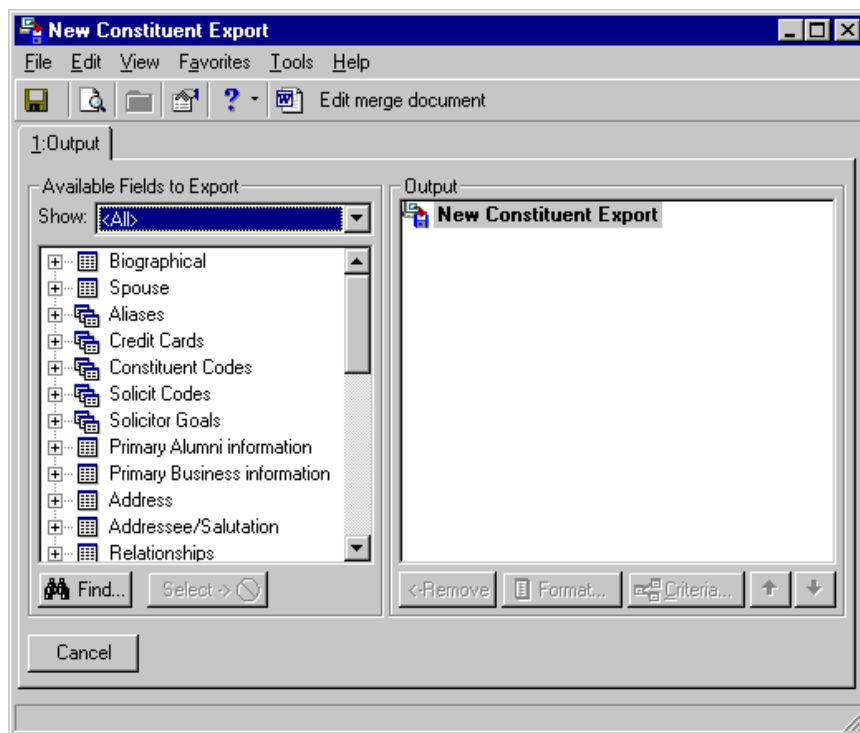
Tip: To show only Biographical category fields, select Biographical in the **Show** field of the **Available Fields to Export** box. This can make finding a biographical field easier and faster. You can focus on selecting from just those fields.

5. On the Output tab, you need to select the merge fields you want to use in your letter. In the **Available Fields to Export** box on the left, click the plus sign to the left of the Biographical category. From this list, select **Last Name**, **Name**, and **Title 1**.

Under Biographical, scroll down and double-click **Last Name**. **Last Name** appears in the **Output** box on the right. To move a field from the **Available Fields to Export** box, you can also highlight the field and click **Select**. Continue to move each biographical field, one at a time, to the **Output** box.
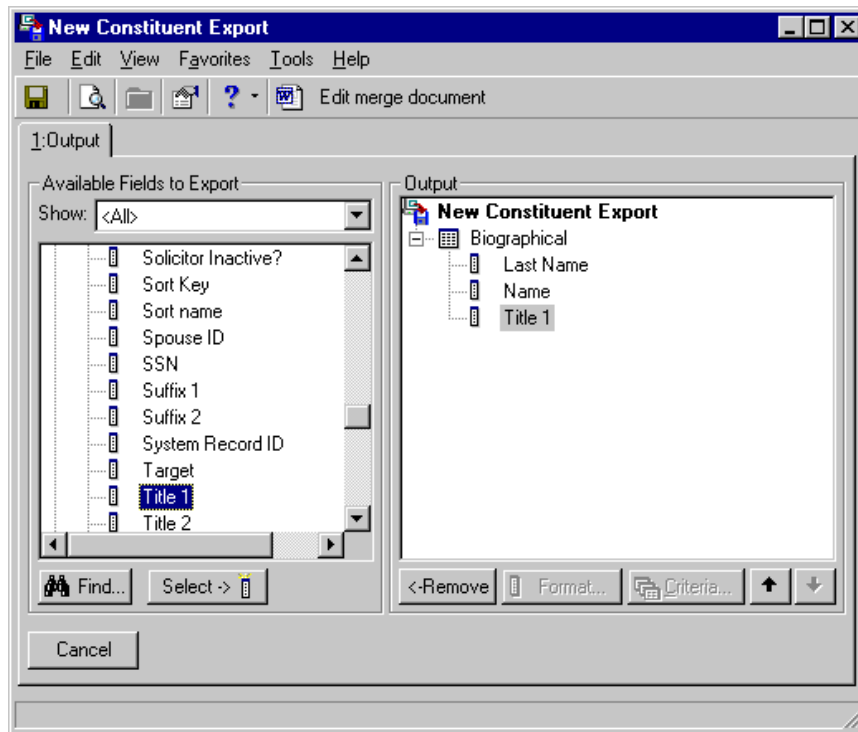

Tip: To show only address fields, select Address in the **Show** field of the **Available Fields to Export** box. This can make finding an Address category field easier and faster. You can focus on selecting just those fields.

6. In the **Available Fields to Export** box, scroll down to the Address category (under Primary Business information) and click the plus sign to the left. Next, click the plus sign to the left of Preferred Address. The preferred address field list expands. From this list, you need **Address line 1**, **Address line 2**, **City**, **State**, and **ZIP** as address merge fields in your letter. Scroll down and double-click each to move them over to the **Output** box.
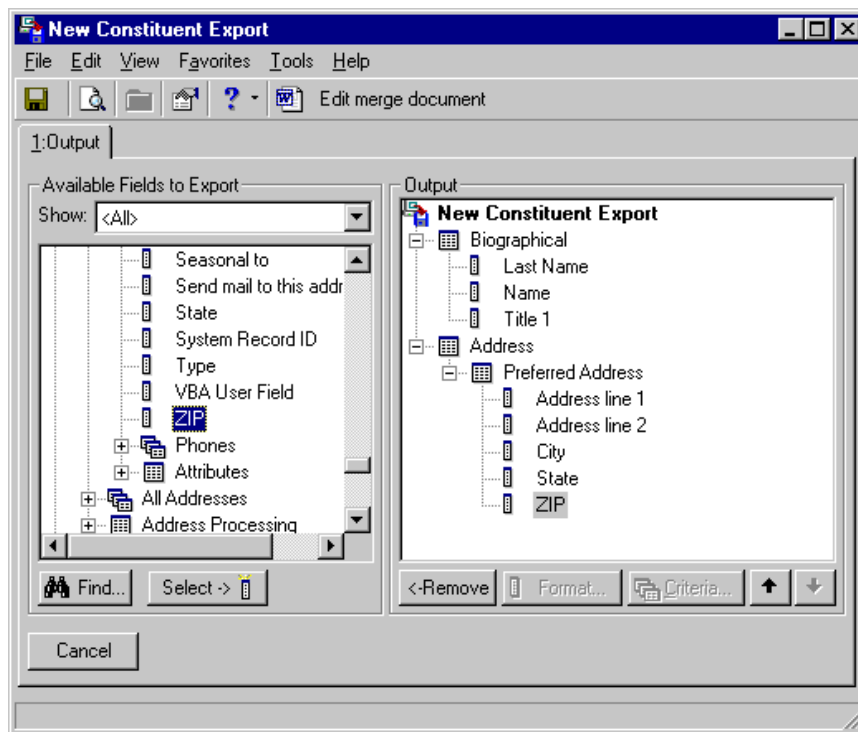
Note: You can enter a date in your Microsoft *Word* merge document that automatically updates. From the menu bar select **Insert**, **Date and Time**. Select the date format you want to use.

7. Once you select your merge fields, click **Edit merge document** on the toolbar. Microsoft *Word* opens, and a blank Merge document appears.
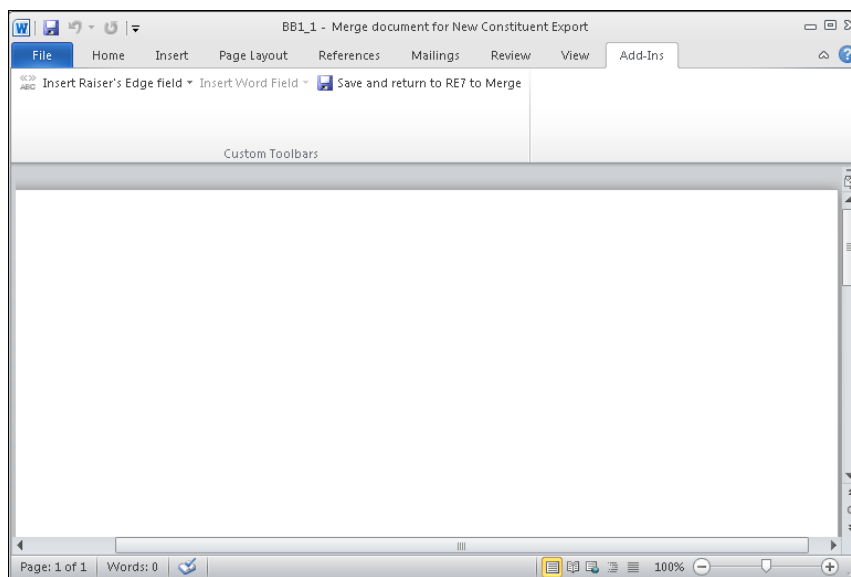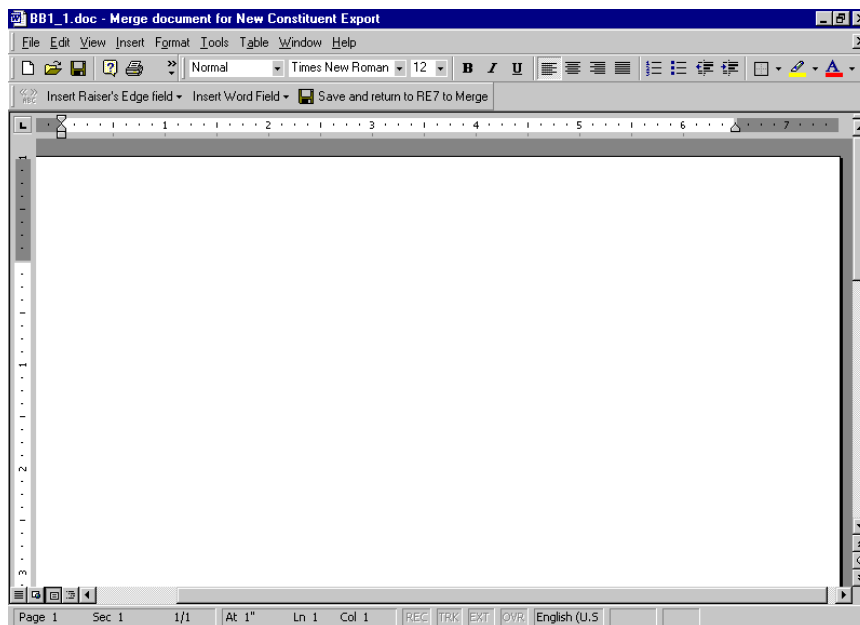
As you write your merge document, you are going to insert merge fields into the letter. When you print the letter, the correct information is exported out of *The Raiser's Edge* and appears in the designated areas (placeholders) of your letter.

8. To place a field in the letter, place your cursor where you want the field in *Word*.

9. Click **Insert Raiser's Edge field** on the toolbar. Select the field you need from the list that appears.
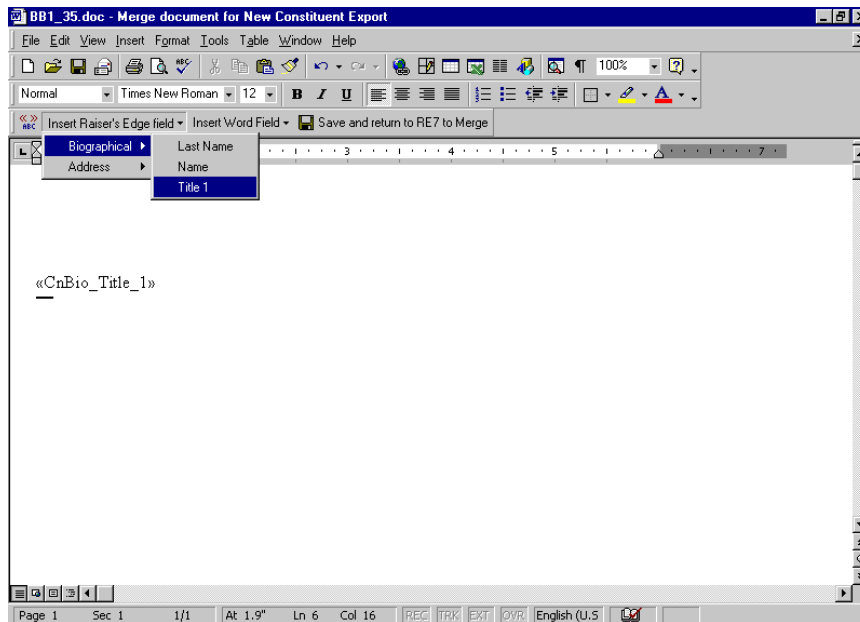

For Microsoft *Word 2007* and *2010*, the **Raiser's Edge** toolbar is located on the Add-Ins tab of the Microsoft *Word* ribbon.
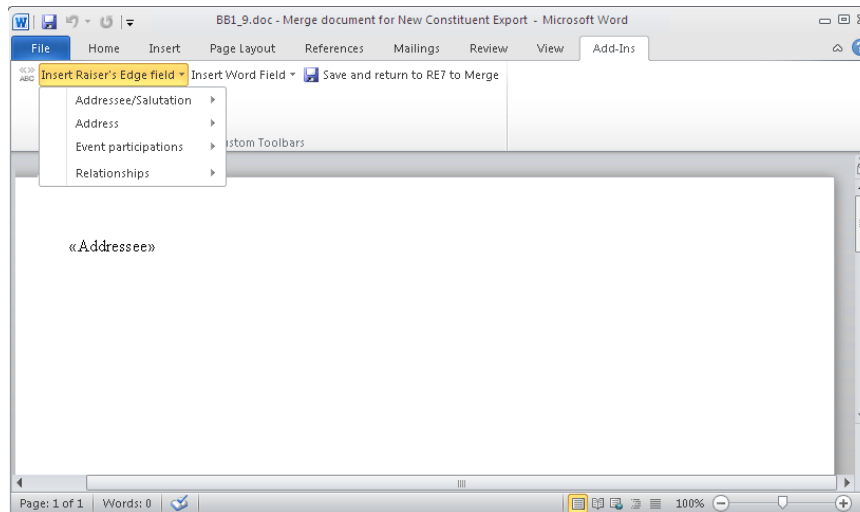
Note: By selecting **Tools**, **Spelling and Grammar** from the menu bar, you can make sure you do not have spelling mistakes in your form letter. You can also search for a different word to use, with the same meaning, by selecting **Language**, **Thesaurus** from the **Tools** menu bar. You can find similar *Word* integration on Notepad screens in *The Raiser's Edge*. On a Notepad screen, you can press **F7** on your keyboard; select **Tools**, **Spelling** from the menu bar; or click the **Spelling** button on the toolbar to spell check your note. You can press SHIFT + **F7** on your keyboard or select **Tools**, **Thesaurus** from the menu bar to access the thesaurus.

10. As you write your text for the letter, repeat these steps to continue placing the fields you want in the letter.
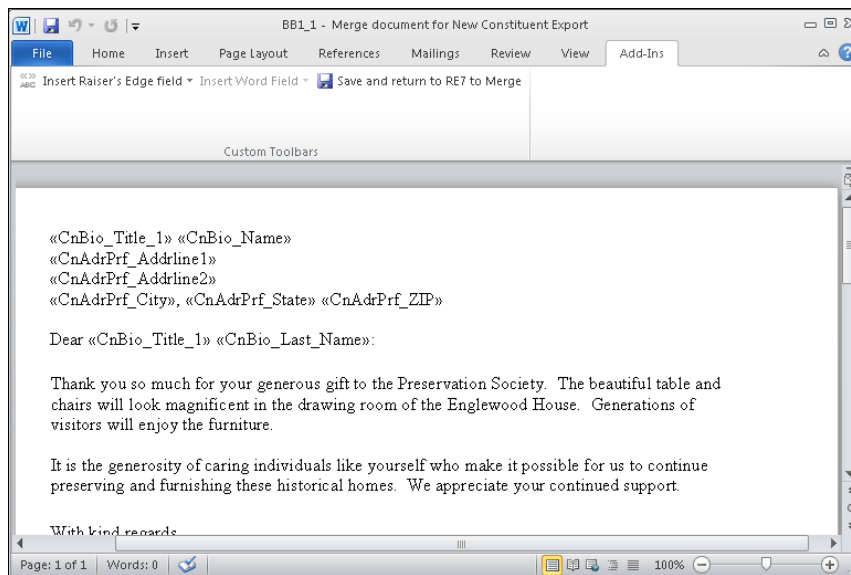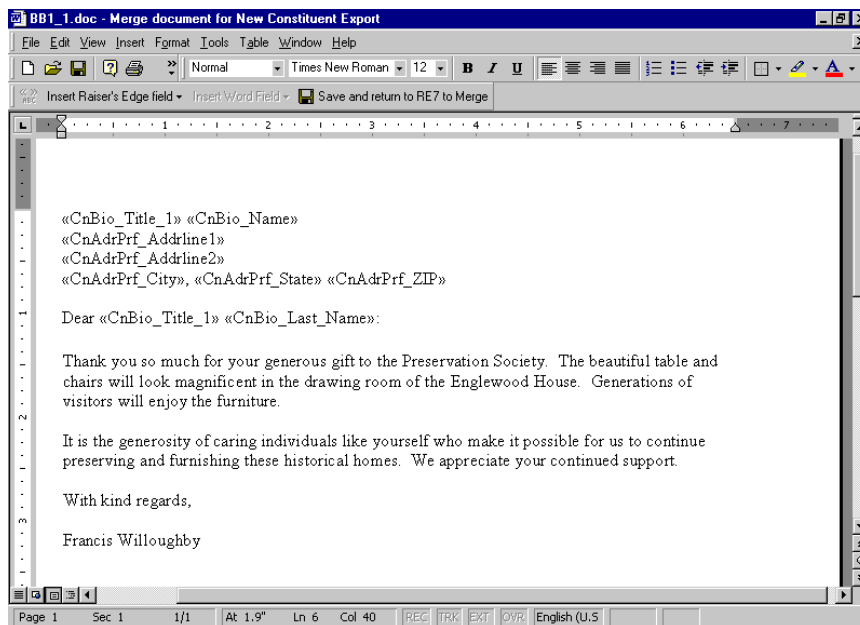
11. On the toolbar, click **Save and return to RE7 to Merge**. You return to the New Constituent Export screen.

12. On the toolbar, click **Save**. The Save Export As screen appears. When you save your export file, you can use it with future letters.

13. Enter an **Export name** and **Description** for your export.

14. The **Export Type** field is disabled because you selected Constituent on the Create a New Export screen.

15. If you want to authorize other users to run your export, mark the **Other users may run this export** checkbox.

16. If you want to authorize other users to change your export, mark the **Other users may modify this export** checkbox.

17. Click **Save**. The export record and is saved and you return once again to the New Constituent Export screen. The title on the screen changes to the export name you just entered.

    For more information about creating exports in *The Raiser's Edge*, see the Export chapter of the *Query & Export Guide*.

18. To close the Constituent Export screen, click the "X" in the top right corner. You return to the New Letter screen.


19. On the toolbar, click **Save and Close**. You return to the constituent record.
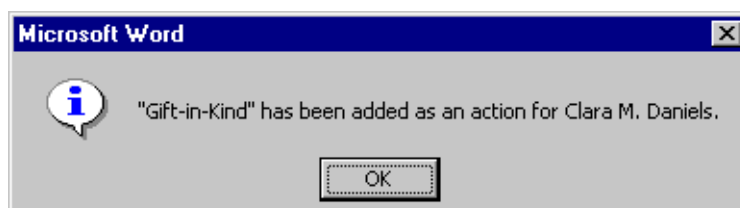
    When you create a new letter, the letter appears on the **Letter** menu of all your constituent records and on the Letters page, accessed from the **Letters** link of *Configuration*.

20. From the menu bar of the constituent record, select **Letter**, then the name of the new letter. Your *Word* document appears. The merge is complete. You can now edit or add to the letter, as needed.
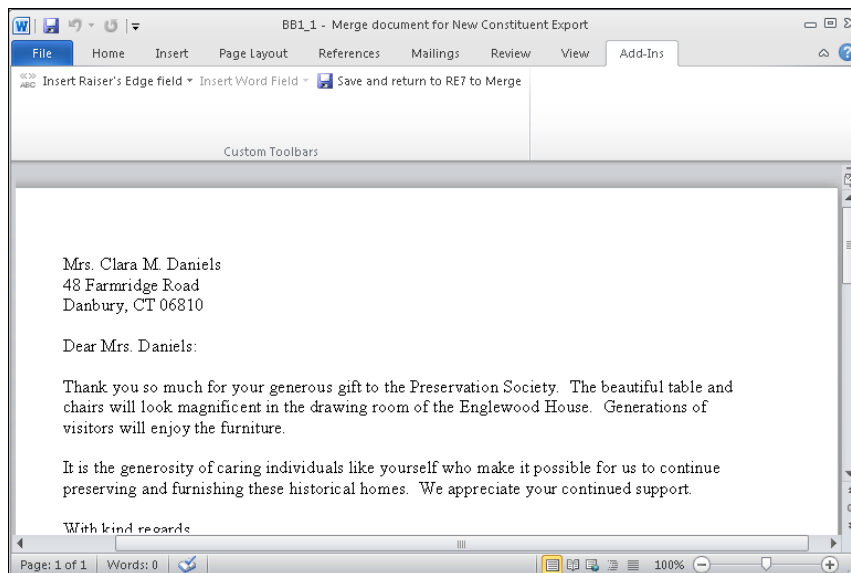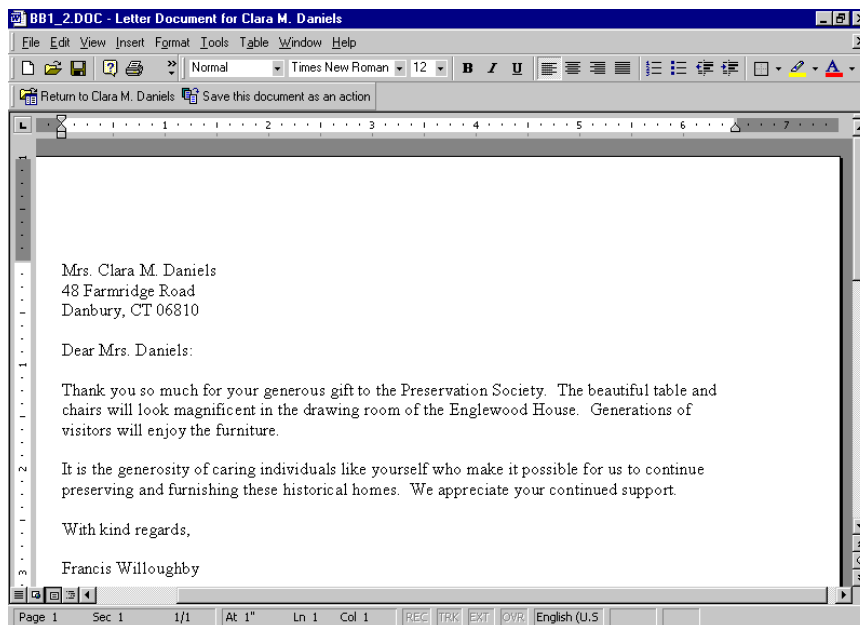
Note: To print the letter, select **File**, **Print** from the menu bar.

21. You can save the letter document as an action. On the toolbar, click **Save this document as an action**. A message appears, letting you know the action has been added.

> **Note**: The **Action type** field on the action record remains blank unless you add a business rule to include a type. For example, in **Constituent options**, **General options** of **Business Rules**, you can select to add RE Letter Document in the **When an action is created for a letter** frame. Mark the **Set the action type to [Action type] for action letters** checkbox. In the drop-down field, select "RE Letter Document" to add this action type when an action is created for a letter.

> The letter appears as an action on the Actions tab of the constituent's record. To view the action, you must select the Actions tab of the constituent record, and open the action. The **Category** of the action is **Mailing**. To access the letter from the action record itself, click the Microsoft *Word* icon in the bottom right status bar. For more information about actions, see the Actions chapter of the *Constituent Data Entry Guide*.

22. On the message, click **OK**. You return to the *Word* document.

23. Once you print the letter, click **Return to [Constituent Name]** on the toolbar. You return to the constituent record, and the letter is saved.

24. On the toolbar of the constituent record, click **Save and Close**.

▶ **Edit merge field information from the Letter menu of a constituent record**

From the **Letter** menu of a constituent record, you can add, change, or delete the constituent record merge fields selected for a mail merge. For more information about editing letters from the Letters page, accessed from the **Letters** link of *Configuration*, see the *Configuration & Security Guide*.

> **Warning**: If you have a version of Microsoft *Word* prior to *Word 2000*, you can see the integration options, but you cannot perform an integrated mail merge using *The Raiser's Edge*. To take full advantage of the enhanced features, you must have *Word 2000*, *XP*, *2003*, *2007*, or *2010* installed on your computer.

1. From the menu bar of a constituent record, select **Letter**, **Modify Letter Menu**.

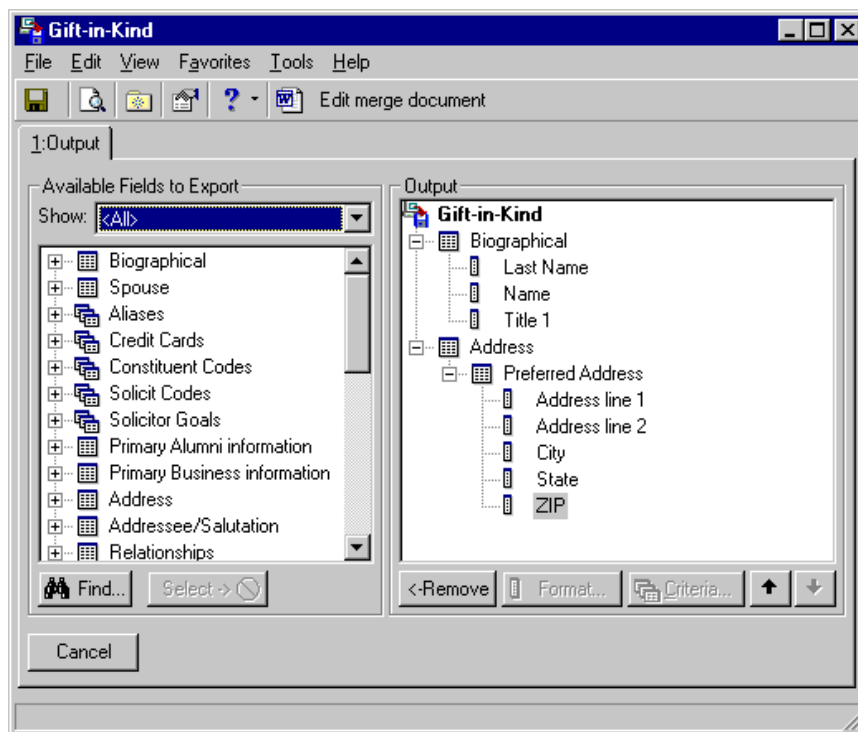The Modify Letter Menu screen appears.

Note: Highlighting a letter on the Modify Letter Menu screen enables the buttons on the right.

2. Highlight the letter which has merge fields you want to change, and click **Open**. The letter screen appears.

3. Click **Edit Export**. The export screen appears. On this screen, you can add additional merge fields to use in your letter.

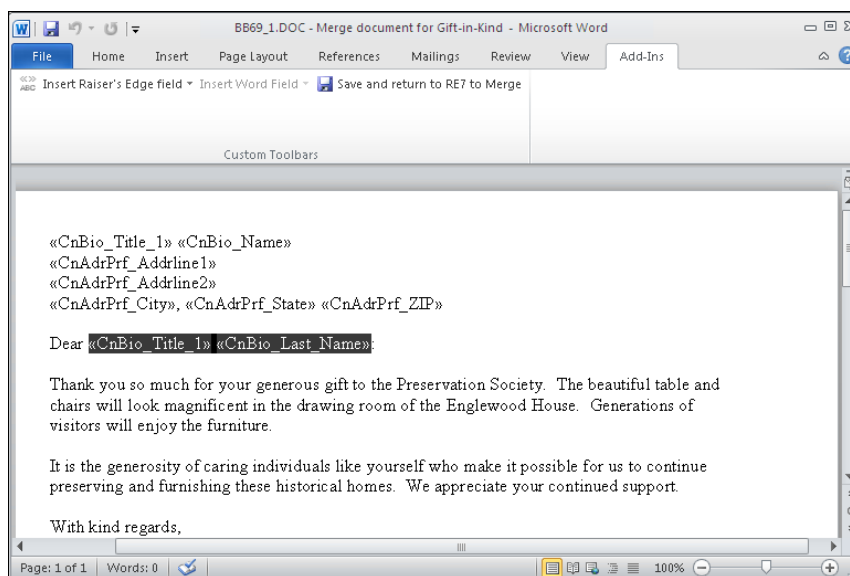**Note**: You can edit the text of a merge document the same way. On the toolbar, click **Edit merge document**. Microsoft *Word* opens, and the merge document appears. You can delete, add, or replace any of the original text in the body or closing of the letter at this time. When finished, click **Save and return to RE7 to Merge** on the toolbar. Continue to follow the rest of this procedure.

4. In the **Available Fields to Export** box on the left, click the plus sign to the left of the category you want. Scroll down and double-click the fields you want. The field appears in the **Output** box on the right.
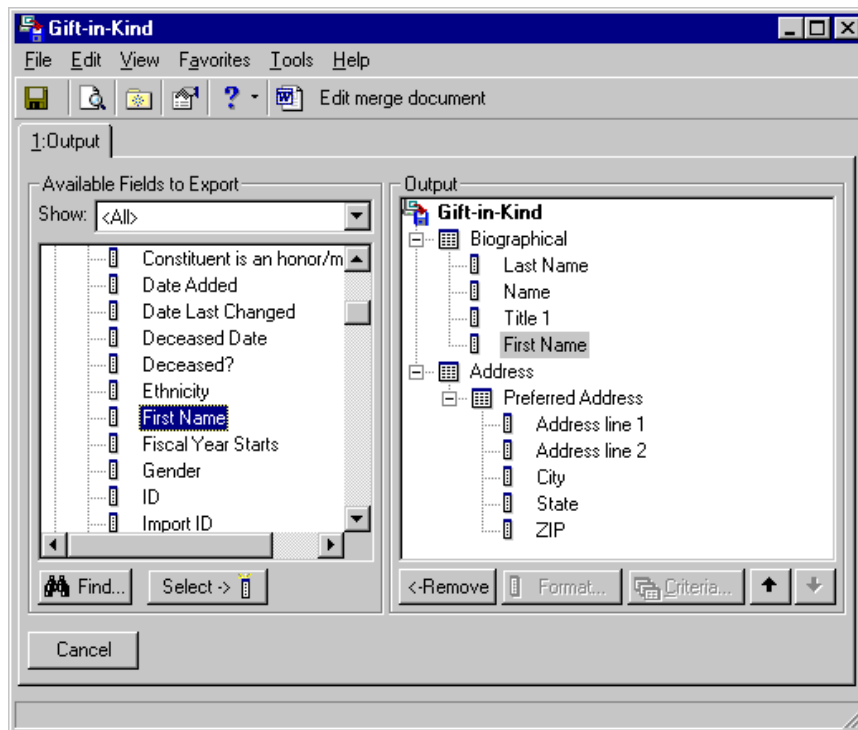
5. On the toolbar, click **Edit merge document**. Microsoft *Word* opens and the merge document appears.

6. Highlight the merge field you want to change and click **DELETE** on your keyboard.

7. Click **Insert Raiser's Edge field** to select a replacement merge field.

    For example, you may want to replace the formal salutation in your letter with a less formal one. You can change the salutation of your letter from "Dear Mrs. Daniels" to "Dear Clara".
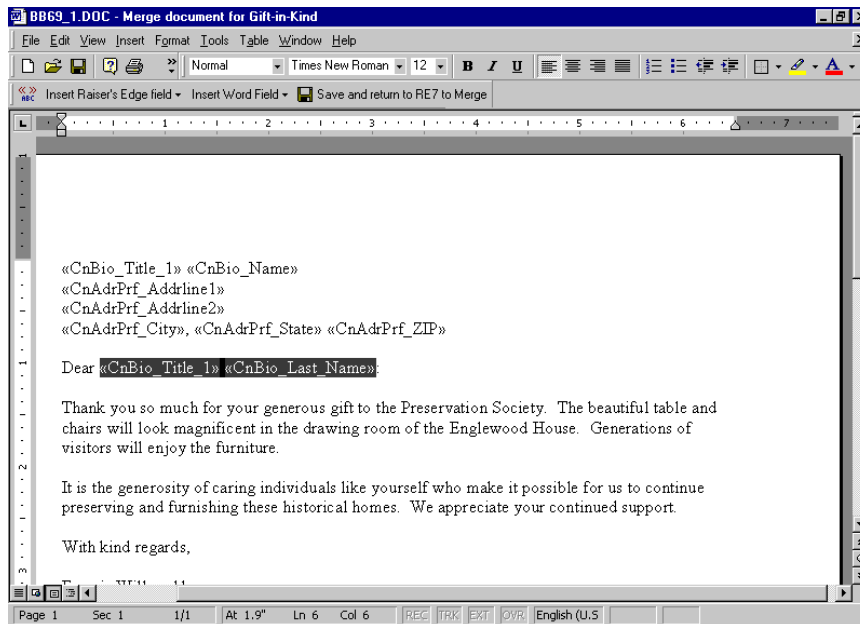
    You can edit the text of the merge document the same way. Click **Edit merge document**. When Microsoft *Word* opens and the merge document appears, you can delete, add, or replace any of the original text in the body or closing of the letter at this time.

8. On the toolbar, click **Save and return to RE7 to Merge**. You return to the export screen.

9. On the toolbar, click **Save** and then, click the "X" in the right top corner. You return to the letter screen.

10. On the toolbar, click **Save and Close**. You return to the Modify Letter Menu screen.

11. Click **Close**. You return to the constituent record.

12. On the toolbar, click **Save and Close**.

▸ **Quickly write a letter from the Letter menu of a constituent record**

From an individual or organization constituent record, you can quickly connect to Microsoft *Word* to write a letter. From the **Letter** menu, select **Write a Letter**. A *Word* document appears, with certain fields defaulting into the letter. The Long Date (a *Windows* setting), Primary Addressee, Preferred Address, and Primary Salutation automatically appear in your letter.

Note: If an action record has the **Category** of **Mailing**, in the **Letter** field, you can quickly create a letter directly from the action record. Click the Microsoft *Word* icon in the **Letter** field. You can follow this procedure and apply the same techniques to write a letter from an action record. For more information about action records, see the Actions chapter of the *Constituent Data Entry Guide*.

1. From the menu bar of a constituent record, select **Letter**, **Write a Letter**.

Tip: You can also click the **Word** button on the toolbar to quickly write a letter.

If the constituent from which you are writing the letter is an organization, the Search relationships screen appears, so you can select the contact to whom to address the letter.

2. If you choose to send the letter to **One of the constituent's relationships**, the Search relationships screen appears, so you can select the contact to whom to send the letter. If you choose to send the letter to the **Constituent**, this screen does not appear, and the letter is addressed to the constituent itself.
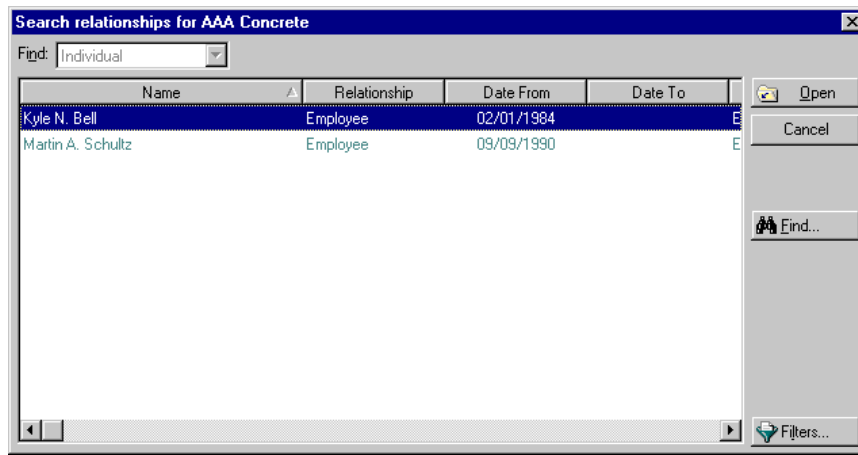
3. Select a contact name in the grid and click **Open**.

   The *Word* document appears. The merge is complete. You can now continue to write and print your letter.

If the constituent record from which you are creating the letter is an individual, once you select **Letter**, **Write a Letter** from the menu bar, the *Word* document appears.
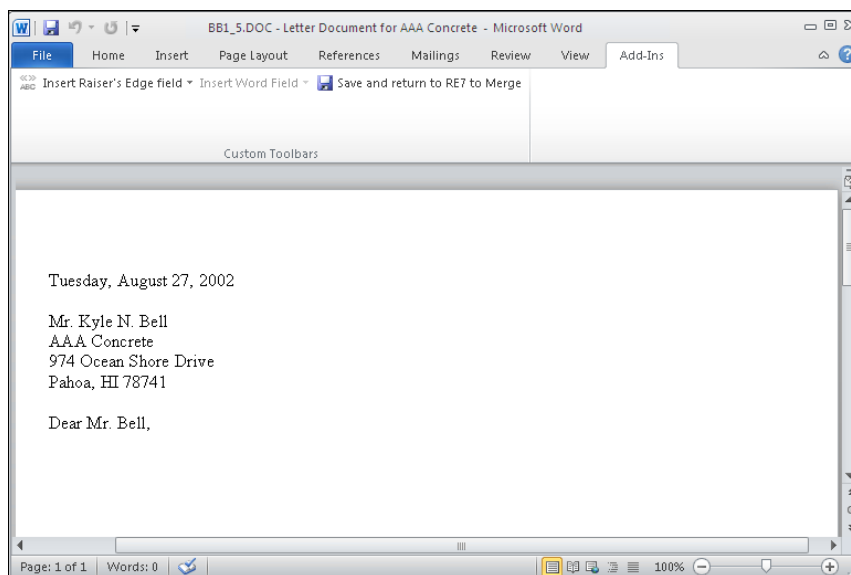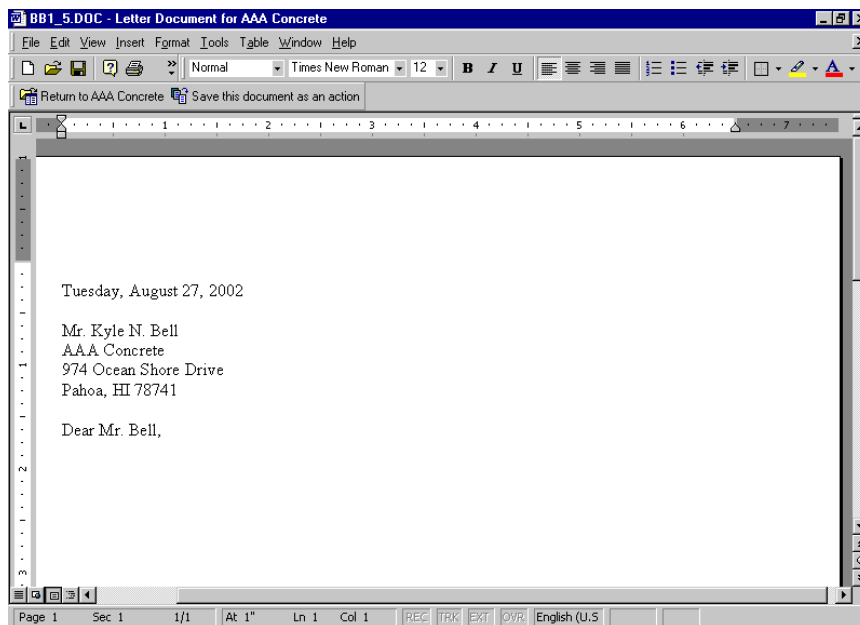
Note: To print the letter, select **File**, **Print** from the menu bar.

4. You can save the letter document as an action. On the toolbar, click **Save this document as an action**. A message appears, letting you know the action has been added.

Note: The **Action type** field on the action record remains blank unless you add a business rule to include a type. For example, in **Constituent options**, **General options** of **Business Rules**, you can select to add RE Letter Document in the **When an action is created for a letter** frame. Mark the **Set the action type to [Action type] for action letters** checkbox. In the drop-down field, select "RE Letter Document" to add this action type when an action is created for a letter.

> The letter appears as an action on the Actions tab of the constituent's record. To view the action, you must select the Actions tab of the constituent record, and open the action. The **Category** of the action is **Mailing**. To access the letter from the action record itself, click the Microsoft *Word* icon in the bottom right status bar. For more information about actions, see the Actions chapter of the *Constituent Data Entry Guide*.

5. On the message, click **OK**. You return to the *Word* document.

6. Once you print the letter, click **Return to [Constituent Name]** on the toolbar. You return to the constituent record.

7. On the toolbar, click **Save and Close**.

Create a Letter from a Gift Record

Note: On the Letters page, accessed from the **Letters** link of *Configuration*, you can set up the letters you use at your organization. You can create merge documents from *The Raiser's Edge*, link letters you create from Microsoft *Word* to *The Raiser's Edge*, and edit your merge fields. For more information about the **Letters** link of *Configuration*, see the *Configuration & Security Guide*.

In *The Raiser's Edge*, if you use Microsoft *Word*, you can create a single acknowledgement letter from a gift record using the *Word* icon in the **Letter** field. To create a customized acknowledgement letter from a gift record, you can select the merge fields you want to export out of *The Raiser's Edge* to use within your letter and create the merge document from the **Letters** link of *Configuration*. Then, you can select the letter from the **Letter** field and click the Microsoft *Word* icon on a gift record to automate the merge process. For more information about creating an export for your letter and creating the merge document in *Configuration*, see the Configuration chapter of the *Configuration & Security Guide*.

For example, Frances Mills donates an unsolicited cash gift of $5,000 to your organization. To show your appreciation, you want to immediately send a personal acknowledgement letter thanking Frances for her generous gift. Instead of creating an acknowledgement letter for this one gift in *Mail*, you quickly generate the letter from the *Word* icon on Frances's gift record.

▶ **Create a new acknowledgement letter from the gift record**

> If you use Microsoft *Word*, you can create an acknowledgement letter from the *Word* icon of a gift record. To create a customized acknowledgement letter from a gift record, you can select the merge fields you want to export out of *The Raiser's Edge* to use within your letter in and create the merge document from **Letters** in *Configuration*. Then, you select the letter from the **Letter** field and click the Microsoft *Word* icon on a gift record to automate the merge process. For more information about creating your export for your letter and creating the merge document in *Configuration*, see the Configuration chapter of the *Configuration & Security Guide*.

Warning: If you have a version of Microsoft *Word* prior to *Word 2000*, you can see the integration options, but you cannot perform an integrated mail merge using *The Raiser's Edge*. To take full advantage of the enhanced features, you must have *Word 2000*, *XP*, *2003*, *2007*, or *2010* installed on your computer.

1. Open the constituent's gift record you want to generate an acknowledgement letter for. For more information about opening a gift record, see the Gift Record chapter of the *Gift Records Guide*.


2. In the **Letter** field, select "Personalized Thank You". In *Configuration*, you defined the letters that appear in this list. For more information, see the Configuration chapter of the *Configuration & Security Guide*.

Note: You can also use the Microsoft *Word* icon on the gift record toolbar to generate your acknowledgement letters.

3. In the **Letter** field, click the Microsoft *Word* icon. *Word* opens and your letter appears.
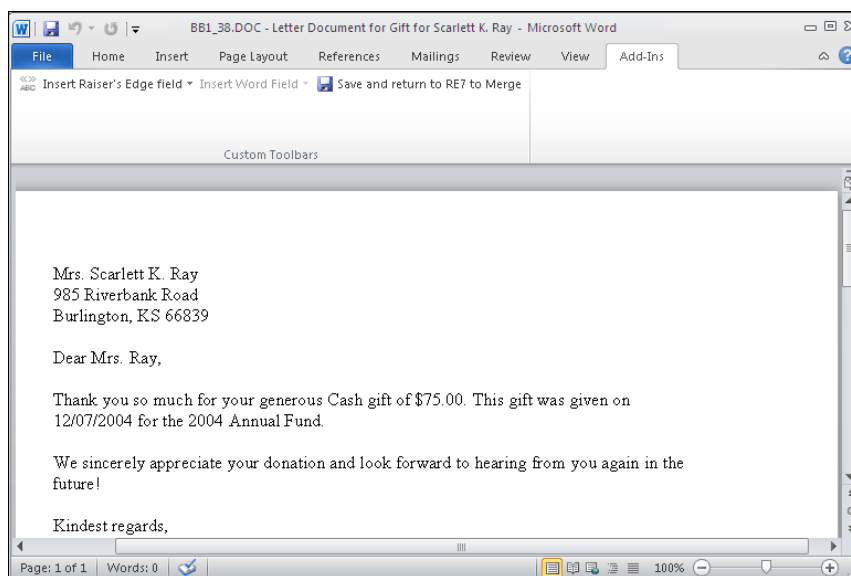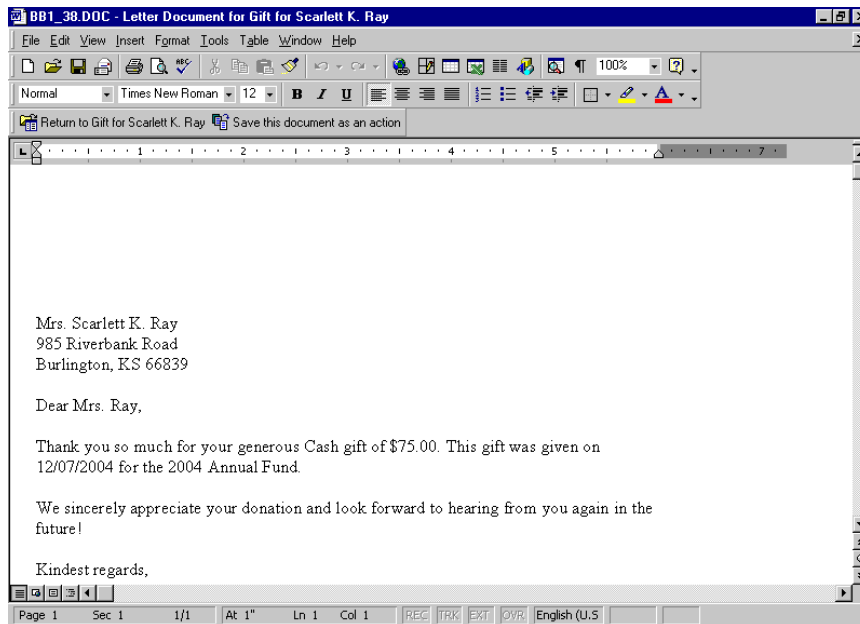
Note: By selecting **Tools**, **Spelling and Grammar** from the menu bar, you can make sure you do not have spelling mistakes in your form letter. You can also search for a different word to use, with the same meaning, by selecting **Language**, **Thesaurus** from the **Tools** menu bar. You can find similar *Word* integration on Notepad screens in *The Raiser's Edge*. On a Notepad screen, you can press **F7** on your keyboard; select **Tools**, **Spelling** from the menu bar; or click the **Spelling** button on the toolbar to spell check your note. You can press SHIFT + **F7** on your keyboard or select **Tools**, **Thesaurus** from the menu bar to access the thesaurus.

4. Add the additional personalized information you want for the letter. For example, you can write "I am so glad you were able to make it to the drop-in and I am very pleased we were able to meet! Please contact me if you have any questions about the Fire Prevention event or about our organization."
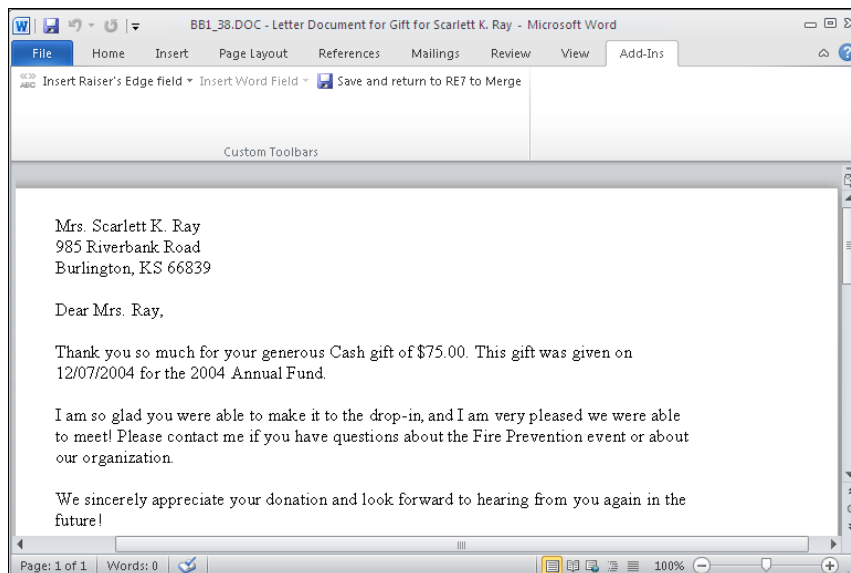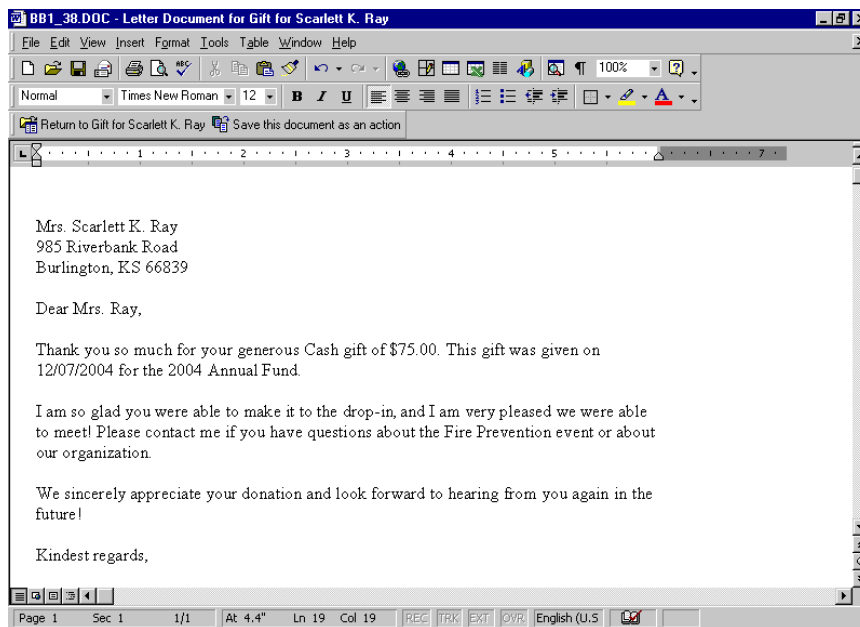
Warning: If you do not save the letter in an action record, you cannot access the letter at a later time to edit or print again. The Microsoft *Word* letter is stored in the action record; not the gift record.

5. To save the letter in an action record, click **Save this document as an action** on the Microsoft *Word* toolbar. A message appears, stating the letter has been saved as an action.
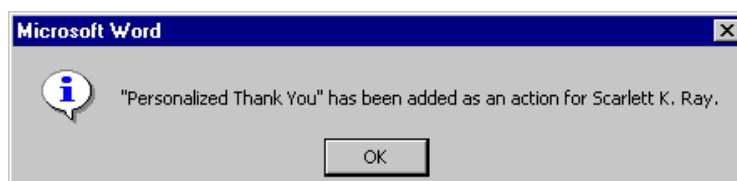
6. Click **OK**. Your return to the Microsoft *Word* letter screen.

7. To print the letter, select **File**, **Print** from the Microsoft *Word* menu bar.

8. Once the letter is printed, click **Return to Gift for [Constituent Name]** on the Microsoft *Word* toolbar. You return to Scarlett's gift record. The **Acknowledge** field automatically defaults to "Acknowledged" and the day's date you are writing the letter on. The **Letter** field is disabled.

Also note the Microsoft *Word* and action record icons appear in the bottom right status bar.

9. To save and close the gift record, click **Save and Close** on the toolbar.

▶ **Edit merge field information from the gift record**

You can edit the acknowledgement letter you created from a gift record, from the same gift record. If you need to edit the merge fields you export for the letter, you should edit the letter in *Configuration*. For more information about editing letters from the **Letters** link of *Configuration*, see the *Configuration & Security Guide*.

1. Open the gift record for which you want to edit the linked acknowledgement letter. For more information about opening a gift record, see the Gift Record chapter of the *Gift Records Guide*.

Note: To open the action record for this acknowledgement letter, click the action record icon in the same right corner of the status bar.

2. Click the Microsoft *Word* icon in the lower right corner of the status bar. Your gift acknowledgement letter appears.
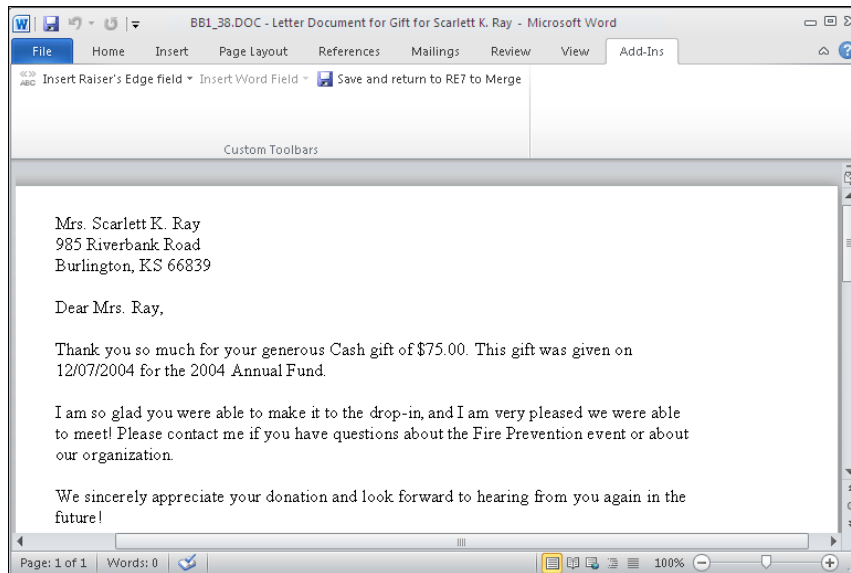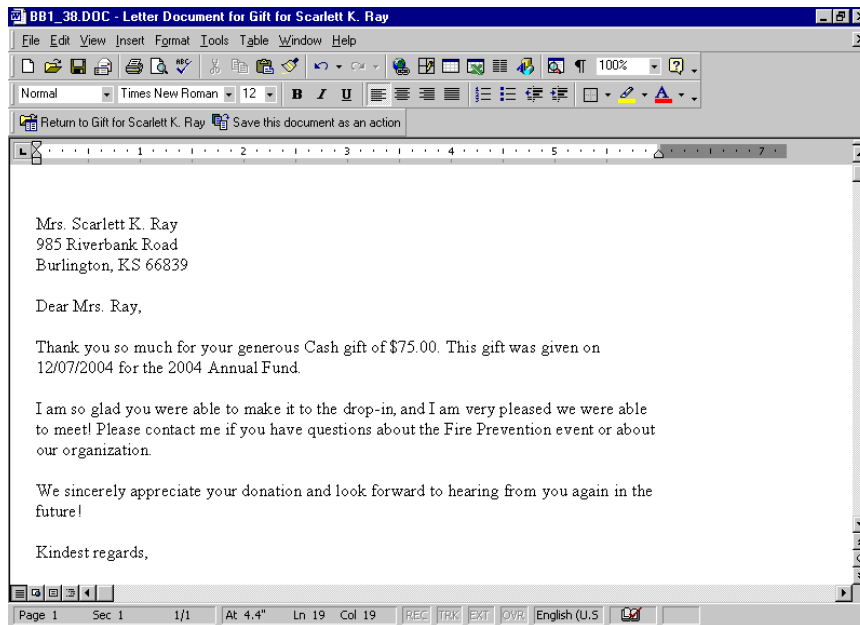
3. Make the changes to the acknowledgement letter you want by editing the letter on the Microsoft *Word* screen.
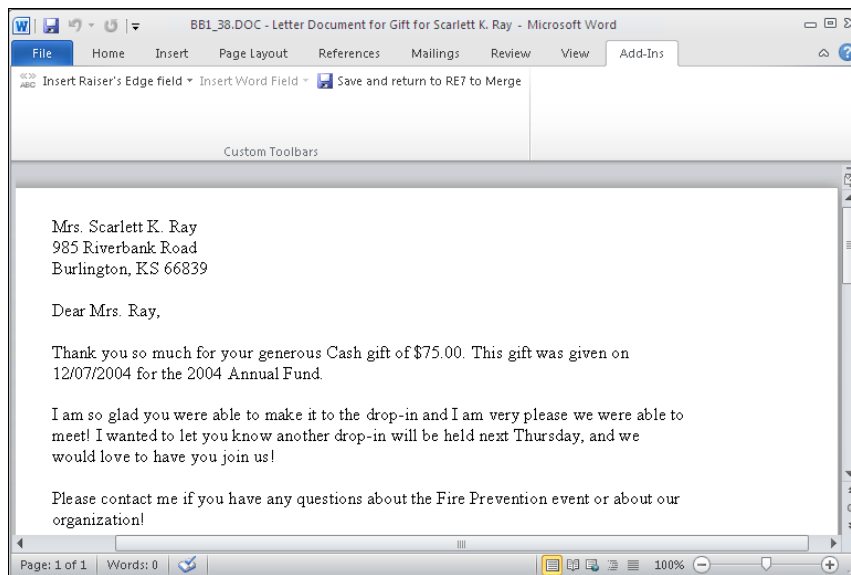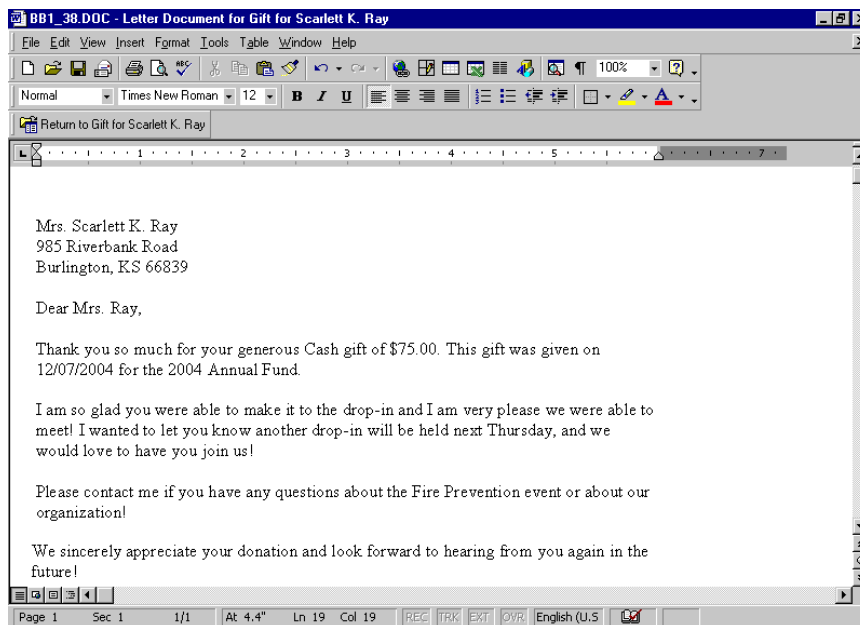
Note: To print the letter, select **File**, **Print** from the Microsoft *Word* menu bar.

4. After your changes are complete, click **Return to Gift for [Constituent Name]** on the Microsoft *Word* toolbar to save the changes.

5. To save and close the gift record, click **Save and Close** on the toolbar.

Pivot Reports

Warning: This chapter is documented using PivotTable 9.0. Depending on your Microsoft *Office* version, you may notice different options and selections in PivotTables. For information about these differences, see the Microsoft help file accessed from the Pivot Report screen.

Numerous standard reports are contained in *The Raiser's Edge Enterprise* to help you quickly produce and view your organization's development information. You may find that these ready-to-use reports provide all the information your organization needs. However, if you need a custom report, one that includes a variety of information not traditionally provided, then your solution may be to create a pivot report.

PivotTables (a Microsoft component "bundled" within *The Raiser's Edge*) in pivot reports are unique tools you can use to create custom views of your information by dragging and dropping information previously gathered using a query. With these interactive reports, you can analyze data and create summaries and reports.

This chapter explains the basics of **Pivot Reports** and includes procedures for getting started and creating reports. In addition, you will find explanations of the basic tools used in creating a pivot report and procedures that provide an overview of creating a pivot report from start to finish. For information this chapter does not cover about PivotTables, access the Microsoft help file from Microsoft's Pivot Report screen.

Frequently Used Terms

Note: A PivotTable is a dynamic, multi-dimensional analysis tool (also known as OLAP or On-Line Analytical Processing) that you can use to gain insight into your data.

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

Drop Column Fields Here area. Any fields you place in this area list across the top of the pivot report. For example, you can place **Address Line 1**, **City**, **State**, and **ZIP** in this area to display the data across the pivot report.

Drop Filter Fields Here area. To display summarized data, you can place a field in this area to filter your entire pivot report. For example, you can place the **Fund Description** field in this area, and then filter an entire report on the 2003 Annual Fund.

Drop Row Fields Here area. Any fields you place in this area list vertically in the pivot report. For example, to list constituent names vertically in the first column of the report, you can place the **Name** field in this area.

Drop Totals or Details Here area. Any field you place in this area automatically generates a **Grand Total** for the field you select. For example, to list individual gift amounts and automatically calculate a **Grand Total** in the last row or column, place the **Gift Amount** field in this area.

Item. An item is a unique piece of data within a field. For example, if you summarize a pivot report by the 2003 Annual Fund, **Fund Description** is the field and 2003 Annual Fund is the item.

Pivot report. A pivot report lets you analyze your *Raiser's Edge* data in a custom report format. You can use the list to view and organize information from your database, look for details, and create summaries and reports.

Understanding Pivot Reports

A pivot report is the product of using an interactive PivotTable to summarize, organize, and calculate your *Raiser's Edge* data. With a pivot report, you get a multi-dimensional view of information you choose to include. You can rotate the rows and columns of a pivot report to see different summaries of your data, filter your data by displaying different pages, or display the details for specific areas of interest. By using a pivot report, you have unprecedented flexibility in creating a report that presents information from your database not included in a standard report.

For example, you can create a query containing constituent names, gift amounts, and appeal descriptions. Using that query, you can create a new pivot report. From there, you can manipulate the data using the pivot report interface to show a grand total for each appeal amount in each column. The detail grid shows the total gift amounts per constituent, per appeal. Or, you can create a query that includes constituents and their past due pledges and fund description. You can then create a pivot report that shows the past due pledges in summary, and with the click of a button shows the past due pledges per fund.

The possibilities for reporting with **Pivot Reports** are nearly endless and are only bound by the information in your database. If you are new to pivot report, the abundant options and amount of customization may seem daunting. However, with practice, you will soon be creating the exact pivot reports you need.

Pivot Report Process Summary

The steps provided in this section give a general overview, describing the process of creating a pivot report using an interactive Microsoft PivotTable in *The Raiser's Edge*.

Step 1 . What is the goal of your report? What information do you want to analyze and present? Answering these two questions is the first step in creating a pivot report. Once you consider what the end result should be and focus on what information to include, you are ready for the next step.

Step 2. Create a query in *The Raiser's Edge* containing the information you want to use in the pivot report. The information you gather using the query will be the basis of your pivot report and is presented in the PivotTable Field List. Think of the field list as a palette of information from which you create your report.

As you create your query, carefully consider which query format you select. For example, If you select a static query, the number of records does not change when you process the pivot report. However, if data has changed in the query, the pivot report reflects this change. If you select a dynamic query, the pivot report results refresh automatically. For more information, see "Creating Pivot Reports" on page 132. For more information about creating queries, see the *Query & Export Guide*.

Step 3. Access the Reports Page in the *The Raiser's Edge* and click **Pivot Reports**. Open a new pivot report using the query you created in step 2.

Step 4. Now, create the report and adjust the layout by dragging and dropping information from the PivotTable Field List into sections of the New Pivot Report screen. This is where you manipulate the presentation of your data and control how the report looks.

Step 5. Analyze the information the report provides. Select the Chart tab on the Pivot Report screen to view a color graph or continue to drag and drop information to tweak the report.

Step 6. Once the report meets the goals you established during step 1, save the pivot report for future use. Once saved, you can access the pivot report quickly from the Pivot Reports page in *Reports*. If you want to print the pivot report, you must export the report to *Excel*. Because you cannot print your report from Microsoft's Pivot Report screen, exporting the report to *Excel* for printing purposes is a simple and quick solution.

Accessing Pivot Reports

To access **Pivot Reports**, click **Reports** from the Raiser's Edge bar, and click the **Pivot Reports** link. The Pivot Reports page appears.
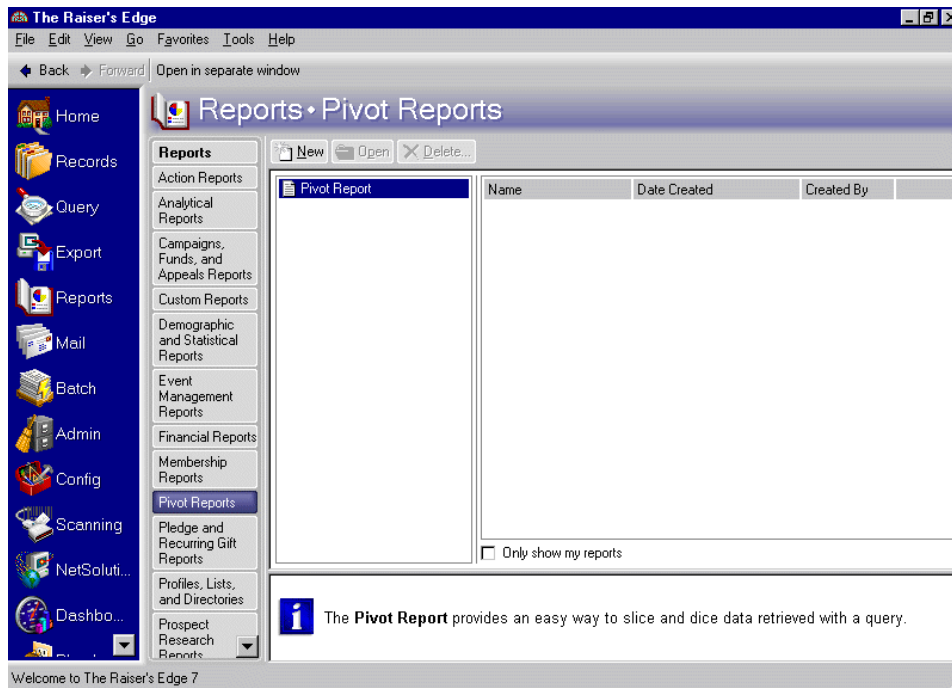
On the Pivot Reports page, you can open a previously created pivot report or create a new one. To create a new pivot report, click **New** on the action bar. To open an existing pivot report, highlight the report you want on the right of the screen and click **Open** on the action bar.

> **Warning**: If you use *2007*, you must download Collaboration Data Objects, version 1.2.1, from www.microsoft.com to be completely compatible with ***The Raiser's Edge***.

The **Pivot Reports** link on ***The Raiser's Edge*** Reports page appears only if *Excel* is installed on your computer. To view Microsoft's PivotTables correctly, you must have *Excel 2000*, *XP*, *2003*, or *2007*. To use the Microsoft *Office* integration features through a terminal session, *Office* must be installed on the Terminal or Citrix Server and published out to users.

Pivot Report Toolbar Buttons

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

The ***Raiser's Edge*** toolbar contains buttons representing common commands in *Reports*. By clicking these buttons, you can easily perform functions, such as saving, without using the menu bar.

Save

Print Preview

Add to Favorites

Raiser's Edge Help Topics

Note: Tooltips automatically appear when you move your cursor across each item in the Microsoft toolbar.

The Microsoft toolbar contains buttons representing common commands used in PivotTables. By clicking these buttons, you can easily perform a function, such as sorting, without right-clicking your mouse. Only the main buttons you use in PivotTables with *The Raiser's Edge* are covered in this section. For more information about other PivotTable toolbar buttons, select the Microsoft help file from the Pivot Report screen.

Copy

Sort in ascending order

Sort in descending order

AutoFilter

Promote (move field to the left)

Demote (move field to the right)

Refresh the PivotTable

Export to Excel

Display the PivotTable Property Toolbox

Display PivotTable Field List

Microsoft help

Anatomy of a Pivot Report

When you create a new pivot report, you load *Raiser's Edge* data gathered using a query and begin with a fresh canvas for your report. This data forms a palette from which you drag and drop the information to include in the report.

The PivotTable interface contains the main Pivot Report screen, which is the canvas, and a small floating field selection screen, which is the palette. This section provides an overview of those elements and includes other pieces of the PivotTable interface you use to create custom reports.

New Pivot Report Screen
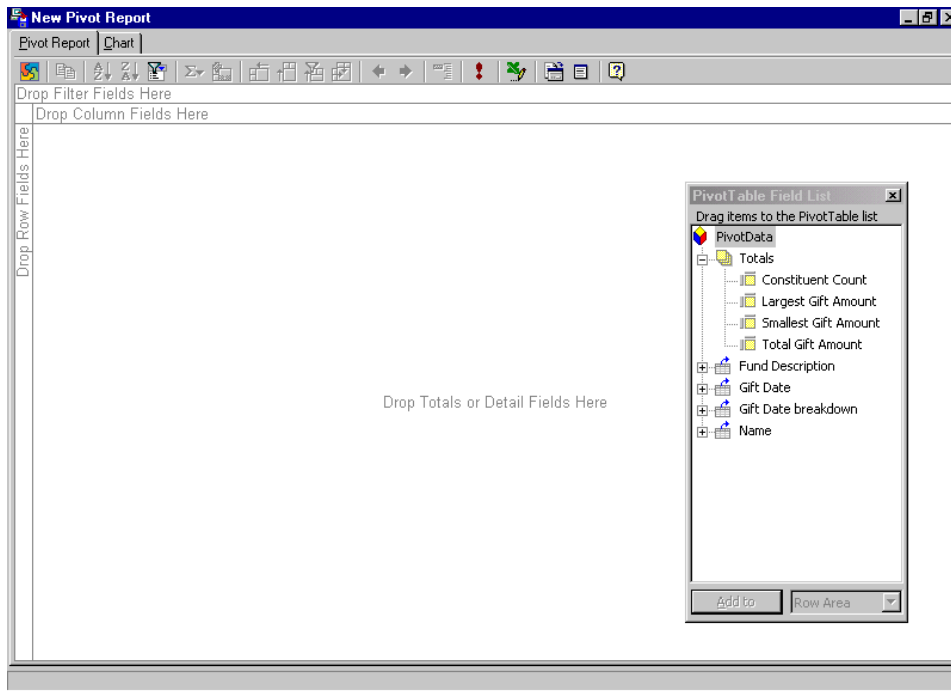
After you click **Generate** on the General tab, the New Pivot Report screen appears. You are now working in a Microsoft component "bundled" within *The Raiser's Edge*. You may notice a distinct difference in functionality while working in this screen. For example, you cannot save a report directly from this screen from the **File** menu or from an icon on the toolbar, as you can in *The Raiser's Edge*. To save a pivot report, you must go back to the *Raiser's Edge* General tab and click **Save** on the toolbar.

The Raiser's Edge **Pivot Report** functionality will enhance as Microsoft updates PivotTable functionality. For more information about Microsoft PivotTables, access Microsoft*'s* help file from the Pivot Report screen. You can access this by pressing **F1** on your keyboard or by clicking **Help** on the Microsoft toolbar.

Pivot Report tab. This is the main area of the PivotTable interface where you manipulate the data to include in the report. On this tab, you drag elements from the PivotTable Field List screen and drop them in designated areas, depending on how you want the information to appear in the report. Specific areas exist for dropping filter fields, column fields, row fields, and total/detail fields.

Chart tab. Once you populate the Pivot Report tab with information, select the Chart tab to view a colorful graph of the pivot report data. This is an alternative view of the report in chart format, which is often helpful in analyzing data.

Toolbar. The PivotTable report toolbar provides quick access to tools you can use to further manipulate your data, including a button to export the pivot information to an *Excel* spreadsheet. You can also use the toolbar to refresh the report, calculate data, sort fields, copy information, and access the Property Toolbox.

PivotTable Field List Screen
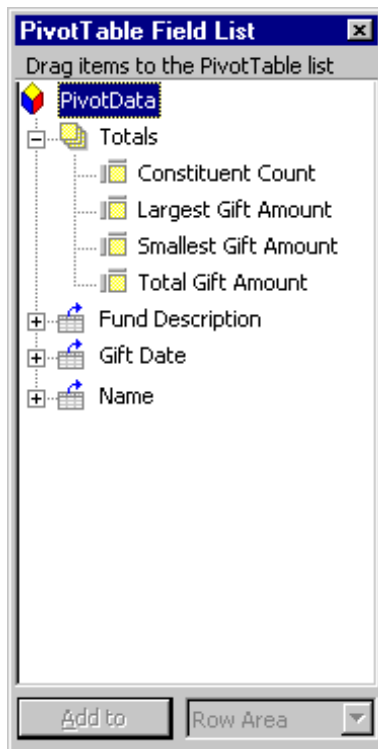
PivotTable List. The information in this list originates from the query you selected when you created the PivotTable. You can drag and drop fields from the list to quickly and efficiently populate the report with *Raiser's Edge* data. The information is displayed in a hierarchical tree view format.

Each field that originates from *Query* lists with a + sign next to the field. Expand the field to select the actual field you want for your pivot report. For example, from the **Totals** field, select **Total Gift Amount** for your report.

Add to. You can use the **Add to** button as an alterative to dragging and dropping information from the PivotTable Field List. Highlight a field, select an area of the report in the drop-down, and click **Add to**.

PivotTable Property Toolbox
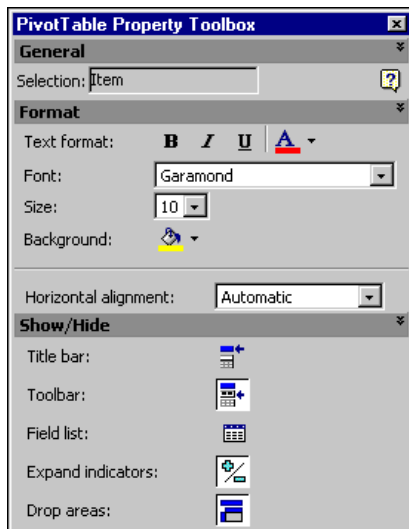
With the PivotTable Property Toolbox, you can customize the look of elements in the pivot report, including alignment, font size, and background color. When you adjust an element using the toolbox, the change appears on the Pivot Report screen. You can quickly access the toolbox from the toolbar or by right clicking and selecting **Property Toolbox** from the shortcut menu that appears. For detailed information, see "Formatting With the PivotTable Property Toolbox" on page 151.

Preparing Queries

After you set a goal for your pivot report and know what information you want to analyze and present, create a query. As you create queries, keep in mind what you want your final output to include. For example, if you want to analyze your organization's overdue pledges for a specific period, you may include information in the query, such as gift amount, latest payment amount, latest payment made, and pledge balance. For more information about creating queries, see the *Query & Export Guide*.

> **Warning**: For the best performance, do not include excess fields on the Output tab in *Query*. Only include fields you want to report on in your query record.

Items selected on the Output tab in *Query* are the fields in the PivotTable Field List screen. **The Raiser's Edge** creates categories for the query data with varying levels of detail depending on the type of information. For example, geographical data could include Country, Region, and City levels, while post date data could include Year, Quarter, Month, and Day levels.

Creating Pivot Reports

After collecting in a query the data you want to use, you are ready to create a pivot report. When you create a pivot report, you add fields of data to various data drop areas. Keep in mind the key feature of the pivot report is the flexibility it provides. You are never committed to one view of information. You can manipulate, filter, add, and remove information an unlimited number of times after creating the report. For more information about customizing pivot reports, see "Customizing Pivot Reports" on page 145.

▸ **Creating a basic pivot report**

For this example, we create a donor giving pivot report, using a query containing donor and fund information. While this example demonstrates data and fields specific to a donor giving pivot report, you can use this procedure as a model for creating any type of pivot report in *The Raiser's Edge*.

Warning: The **Pivot Reports** link on *The Raiser's Edge* Reports page appears only if *Excel* is installed on your computer. To view Microsoft's PivotTables correctly, you must have *Excel 2000*, *XP*, *2003*, *2007* or *2010*.

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

2. Click **Pivot Reports**. The Pivot Reports page appears, displaying a list of saved pivot reports.
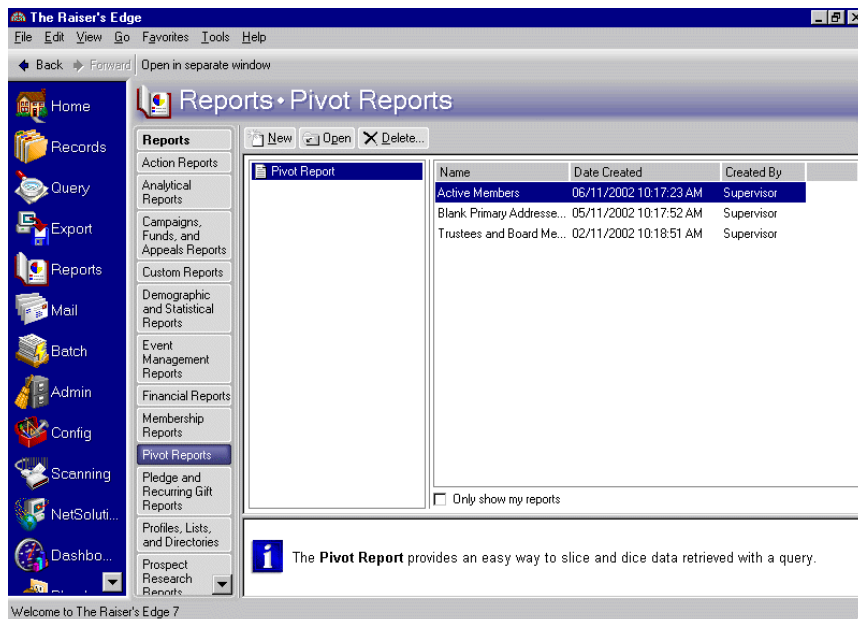
3. On the action bar, click **New**. The New Pivot Report screen appears.
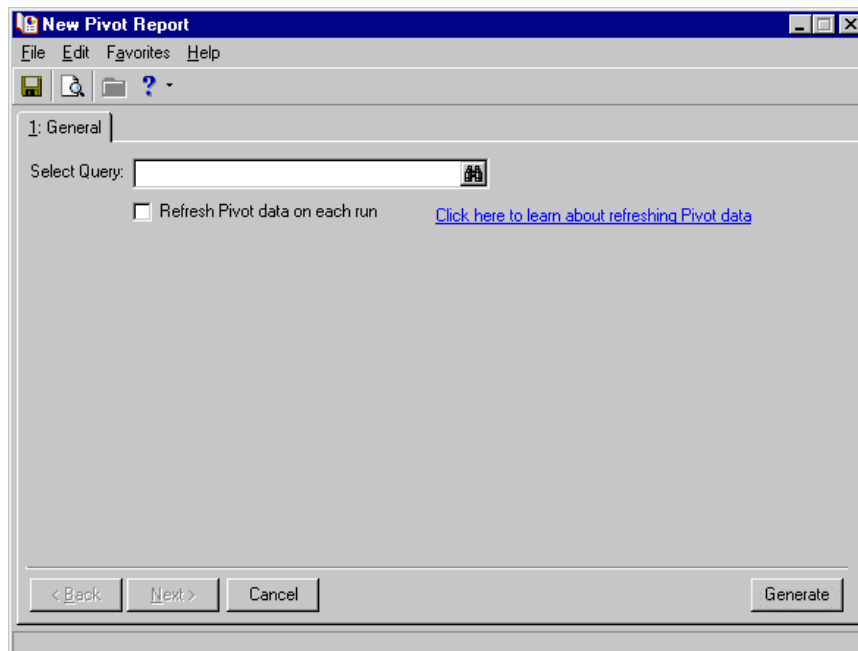
4. On the General tab, in the **Select Query** field, click the binoculars to select a query. The Open screen appears.

5. In the **Query type** field, select "Constituent".

Note: To create a new query for a pivot report, click **Add New** on the Open screen. For more information about creating queries, see the *Query & Export Guide*.

6. Click **Find Now**. Saved queries appear in the grid.

7. Highlight the "Donors for 'This Month'" query and click **Open**. The query defaults in the **Select Query** field.

To

8.   update information in the query each time you preview the pivot report, mark the **Refresh Pivot data on each run** checkbox.
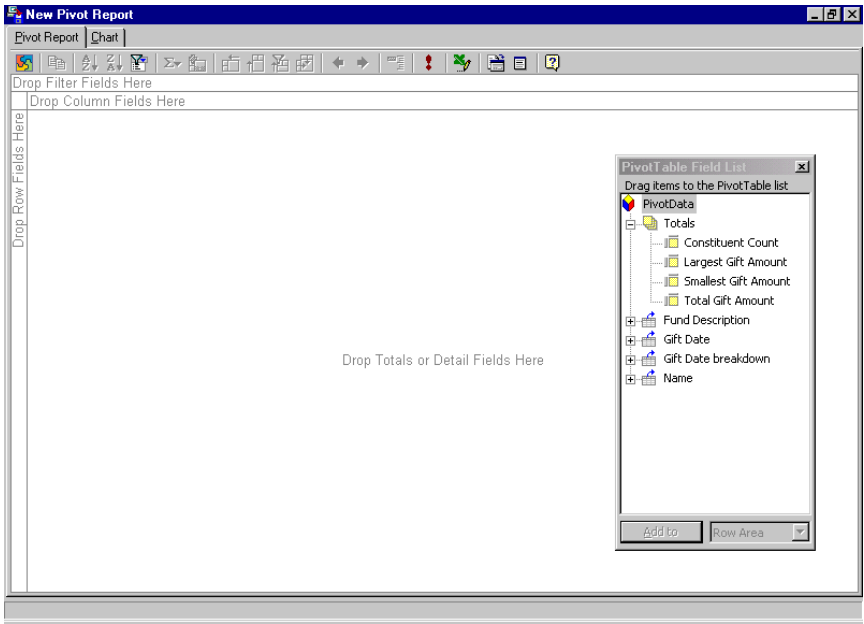

If you select a static query and mark the **Refresh Pivot data on each run** checkbox, the number of records does not change when you process the pivot report. However, if data has changed in the query, the pivot report reflects this change. For example, David Murphy's $250 gift is in the "Donors for 'This Month'" query. Your gift data entry person realizes she made a mistake and this should be $25, so she corrects David's gift record. The next time you process the pivot report, the $25 gift amount appears.

If you select a dynamic query and mark the **Refresh Pivot data on each run** checkbox, the pivot report results refresh automatically.

If you do not mark the **Refresh Pivot data on each run** checkbox for static and dynamic queries, your pivot report contains a "snapshot" of the data in the query. Only the data in the query at the time was originally created appears when you view your pivot report results.

9. Click **Generate**. The Microsoft New Pivot Report screen appears.

The query field information appears in a tree view on the PivotTable Field List screen.

Note: Each field that originates from *Query* lists with a + sign next to the field. Expand the field to select the actual field you want for your pivot report. For example, from the **Name** field, select the second **Name** you view after expanding the original field.

10. Beside **Name**, click the "**+**" to expand the field. Select the **Name** field in the field list, and drag and drop it to the Drop Row Fields Here area.
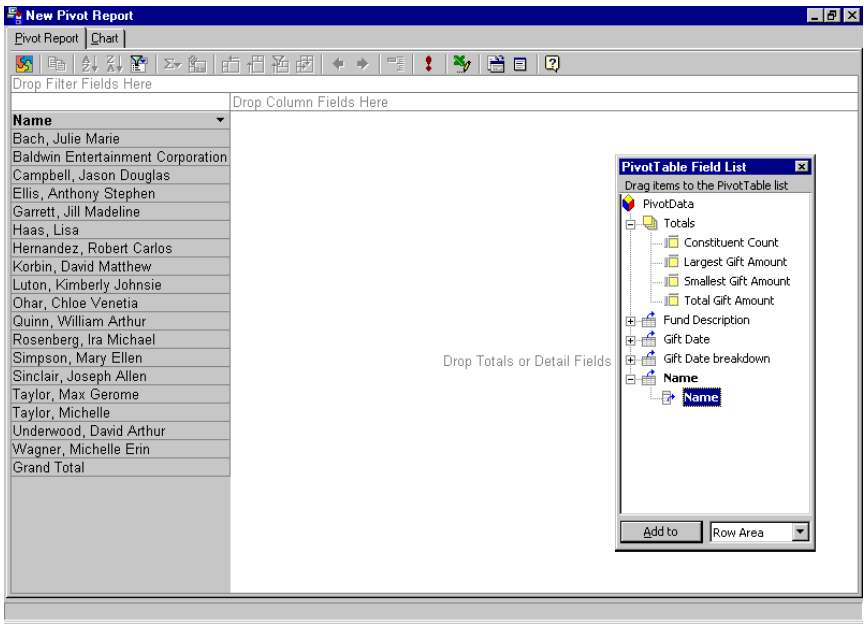
11. Beside **Gift Date**, click the "+" to expand the field. Select the **Gift Date** field in the field list, and drag and drop it to the Drop Column Fields Here area.
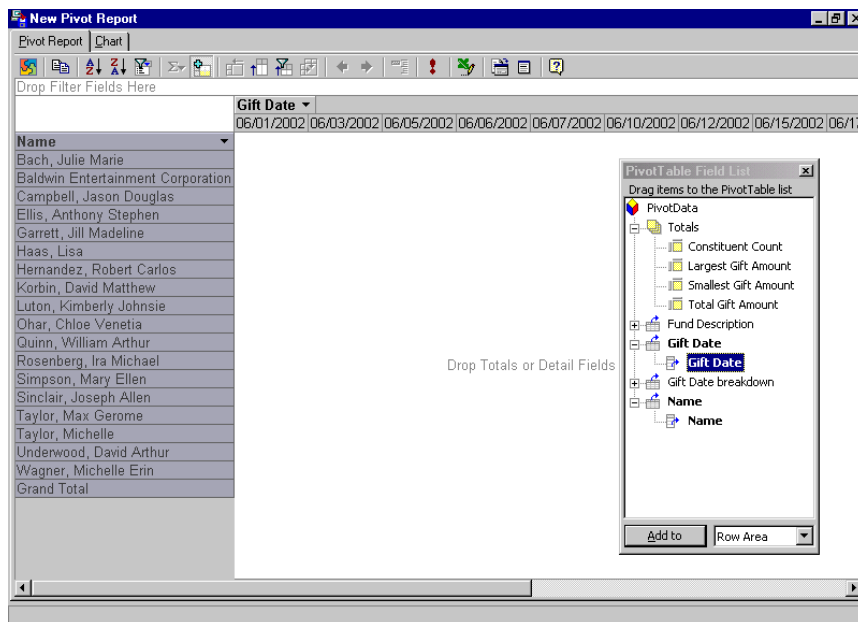
Column headings for each gift date for the constituents appear across the top of the report.

Note: You can use other fields in the **Totals** list to calculate other amounts.

12. Select the **Total Gift Amount** field in the field list, and drag and drop it in the Drop Totals or Detail Fields Here area. This adds all the total gift amounts per constituent to the report.
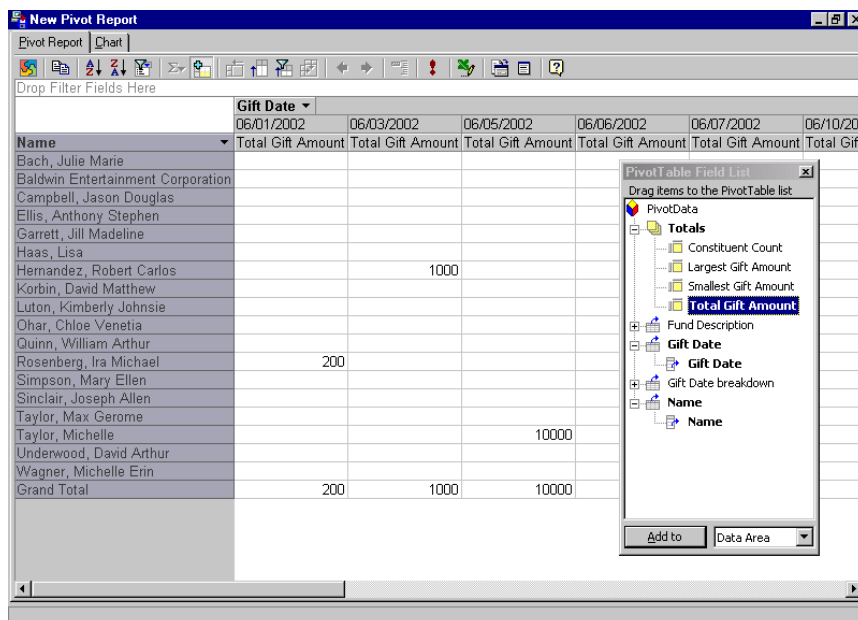
Note: Certain fields cannot be placed in a specific cell on the Pivot Reports screen. For example, the **Total Gift Amount** field cannot be placed in the Drop Column Fields Here area. If you drag a field to a cell it cannot be placed in, a circle icon (with a line through it) appears letting you know the field cannot be dropped in the area.

A **Grand Total** amount is also calculated automatically and displays in the last row.

13. To format the gift amounts with currency text, right-click the **Total Gift Amount** column. A menu appears.
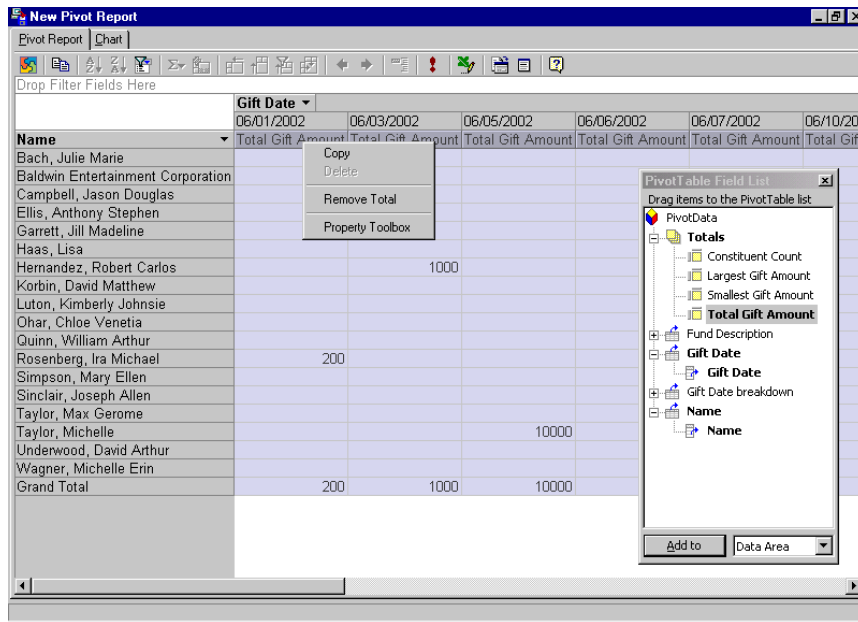
Note: The options you view on the PivotTable Property Toolbox depends on the column you highlight on the Pivot Report screen. For example, if you highlight a currency amount column, the **Number format** field displays. If you highlight a name column, the **Number format** field does not display.

14. From the menu, select **Property Toolbox**. The PivotTable Property Toolbox screen appears.
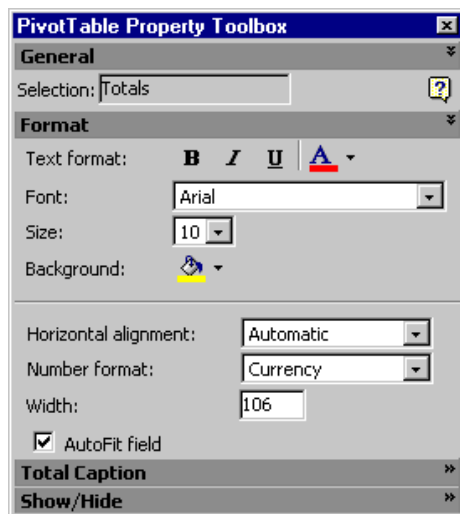

15. In the **Number format** field, select "Currency". The gift amounts automatically formats using "$" and decimals.

16. To return to the New Pivot Report screen, click the "X" in the top right corner of the PivotTable Property Toolbox screen.

Note: You can use filter fields to confine the view to a particular part of the available data. For example, if you move the **Fund Description** field to the row or column area, you can display a summary for one fund at a time.

17. Select the **Fund Description** field in the field list, and drag and drop it in the Drop Filter Fields Here area.
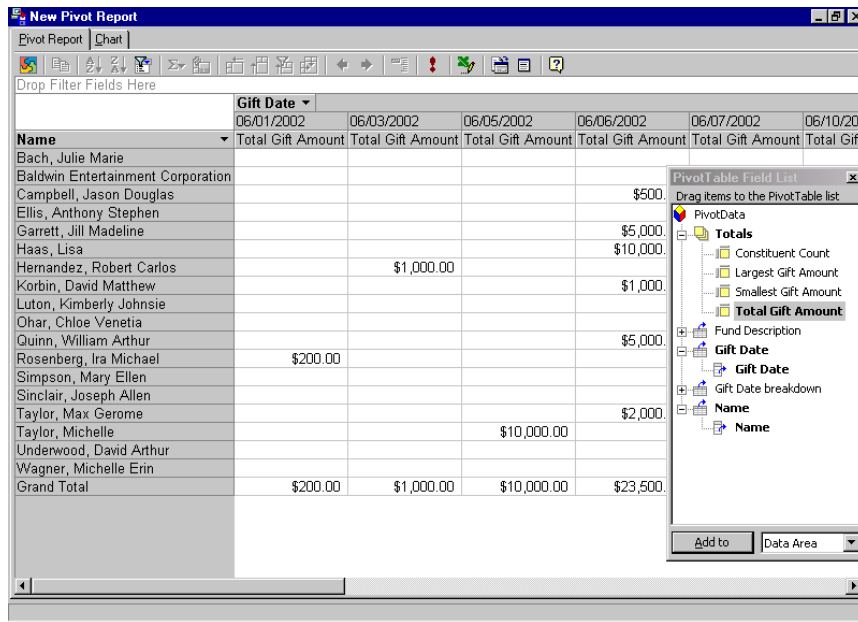
18. To close and save the pivot report, click "X" in the top right corner. You return to the General tab on the New Pivot Report screen.

19. Click **Save** on the toolbar. The Save Report As screen appears.

20. In the **Report name** field, enter "This Month's Donors".

21. In the **Description** field, enter "Includes name, gift date, and fund description".
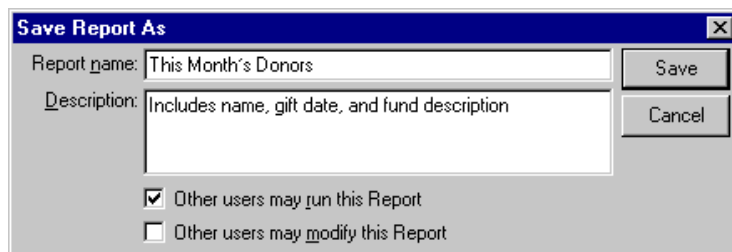
22. If you want to authorize other users to run this pivot report, mark the **Other users may run this Report** checkbox.

23. If you want to authorize other users to change this pivot report, mark the **Other users may modify this Report** checkbox.

24. To return to the General tab, click **Save**.

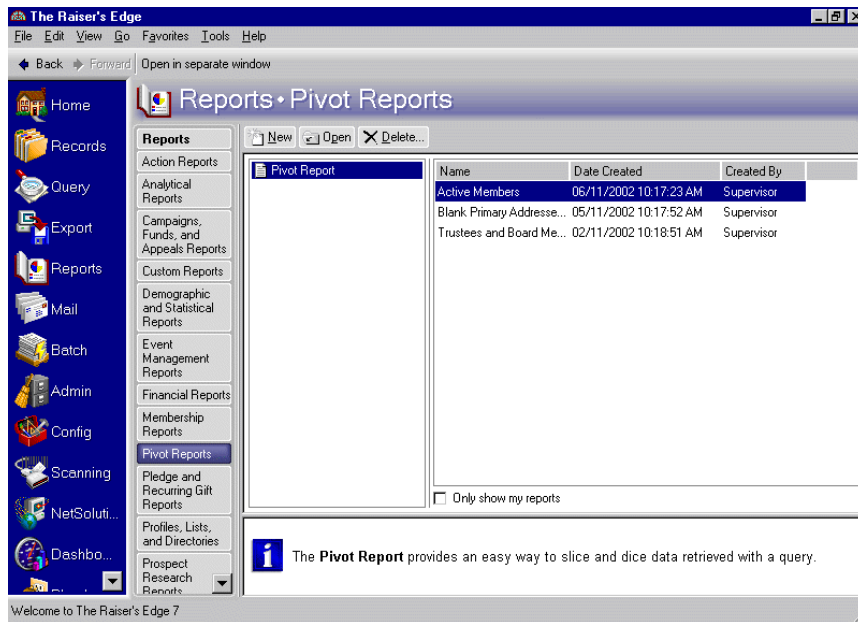25. To return to the Reports page, select **File**, **Close** from the menu bar.

▶ **Creating an advanced pivot report**

For this example, we create a constituent pivot report using a query containing gift information and biographical details. While this example demonstrates data and fields specific to a constituent pivot report, you can use this procedure as a model for creating any type of advanced pivot report in *The Raiser's Edge*.
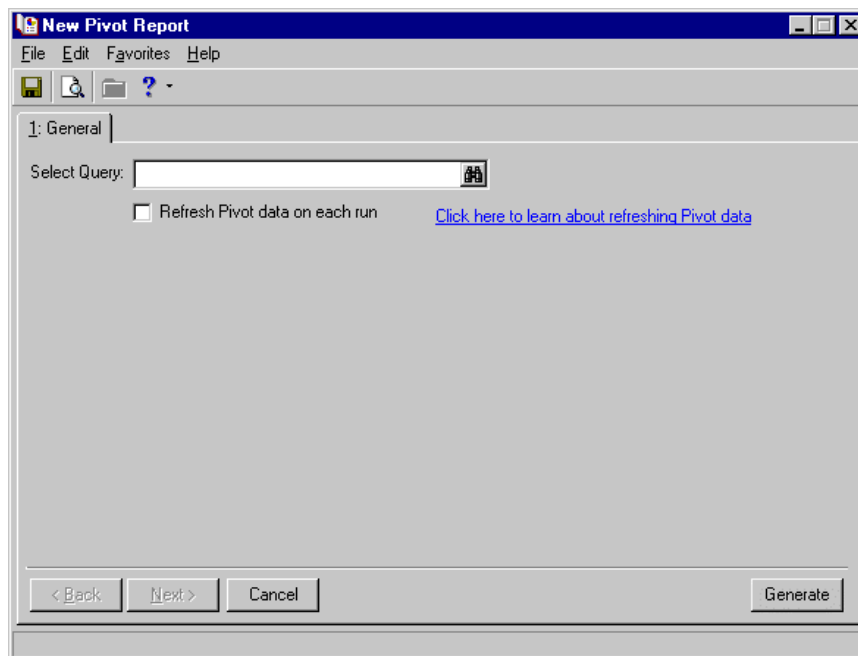
Warning: The **Pivot Reports** link on *The Raiser's Edge* Reports page appears only if *Excel* is installed on your computer. To view Microsoft's PivotTables correctly, you must have *Excel 2000*, *XP*, *2003*, or *2007*.

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

2. Click **Pivot Reports**. The Pivot Reports page appears, displaying a list of saved pivot reports.

3. On the action bar, click **New**. The New Pivot Report screen appears.

4. On the General tab, in the **Select Query** field, click the binoculars to select a query. The Open screen appears.

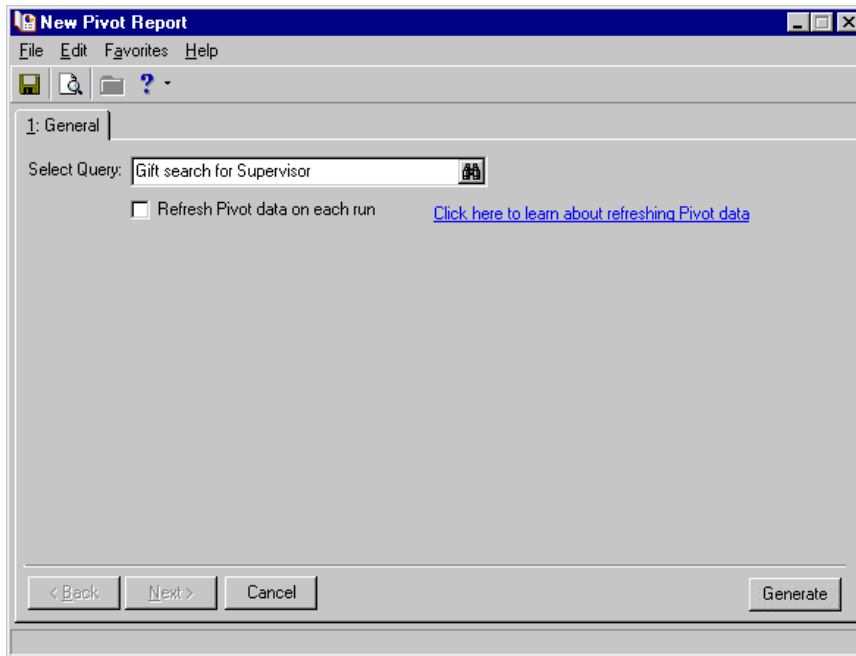5. In the **Query type** field, select "Gift".

Note: If you open an existing pivot report and select a different query, you receive a message stating that the query may not contain all the fields used in the report. Click **Yes** if you are sure you want to use the query you select in the pivot report.

6. Click **Find Now**. Saved queries appear in the grid.

7. Highlight the "Gift search for Supervisor" query and click **Open**. The query defaults in the **Select Query** field.

   To create a new query for a pivot report, click **Add New** on the Open screen. For more information about creating queries, see the *Query & Export Guide*.

8. To update information in the query each time you preview the pivot report, mark the **Refresh Pivot data on each run** checkbox.
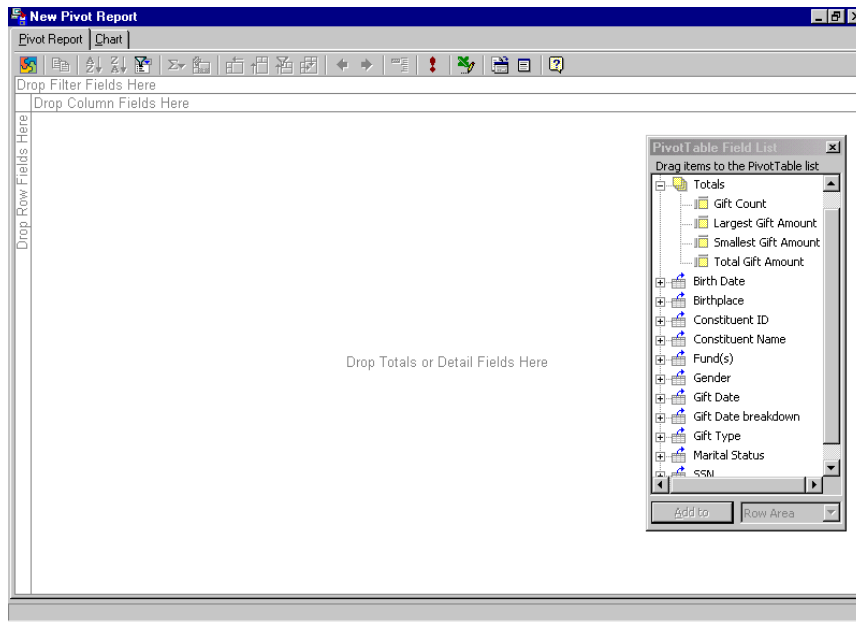

If you select a static query and mark the **Refresh Pivot data on each run** checkbox, the number of records does not change when you process the pivot report. However, if data has changed in the query, the pivot report reflects this change. For example, David Murphy's $250 gift is in the "Donors for 'This Month'" query. Your gift data entry person realizes she made a mistake and this should be $25, so she corrects David's gift record. The next time you process the pivot report, the $25 gift amount appears.

If you select a dynamic query and mark the **Refresh Pivot data on each run** checkbox, the Pivot Report results refresh automatically.

If you do not mark the **Refresh Pivot data on each run** checkbox for static and dynamic queries, your pivot report contains a "snapshot" of the data in the query. Only the data in the query at the time was originally created appears when you view your pivot report results.

9. Click **Generate**. The Microsoft New Pivot Report screen appears.

The query field information appears in a tree view on the PivotTable Field List screen.
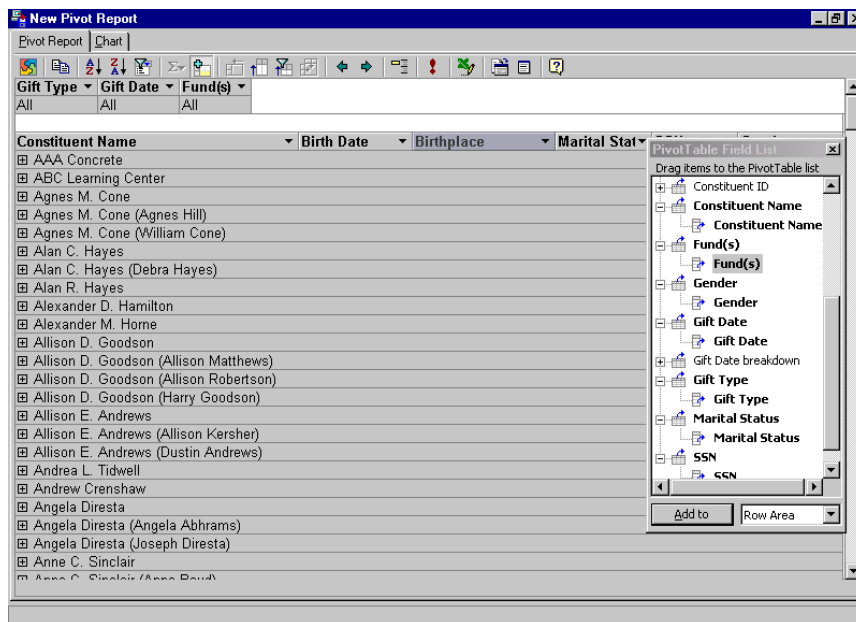

Note: Each field that originates from *Query* lists with a + sign next to the field. Expand the field to select the actual field you want for your pivot report. For example, from the **Name** field, select the second **Name** you view after expanding the original field.

10. Next to any field you want to include in the report, click the "+" on the PivotTable Field List. Drag and drop the fields you need in the Drop Row Fields Here area.
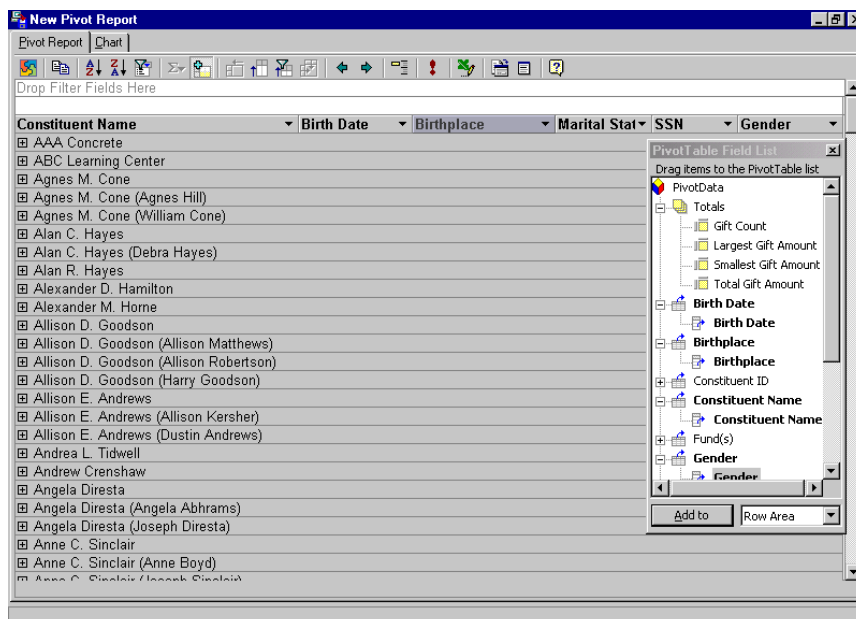
11. Beside the remaining fields you need, drag and drop the fields from the PivotTable Field List in the Drop Filter Fields Here area.

After you include all the fields you want in your pivot report, you can filter any field to view specific information. For example, you can select the drop-down arrow in the **Marital Status** column and select to view records with a marital status of "Single". You can also add and remove other data in the pivot report, hide data, sort data, and view a chart of the report. "Slicing and dicing" the data to analyze information is nearly limitless in **Pivot Reports**. For more information about editing a pivot report to get the results you want, see "Customizing Pivot Reports" on page 145, "Finding and Sorting Data in Pivot Reports" on page 154, and "Pivot Reports Charts" on page 160.

12. To close and save the pivot report, click "X" in the top right corner. You return to the General tab on the New Pivot Report screen.

13. Click **Save** on the toolbar. The Save Report As screen appears.

14. In the **Report name** field, enter "Constituent Biographical and Gift Information".

15. In the **Description** field, enter "Includes multiple bio fields and gift fields".
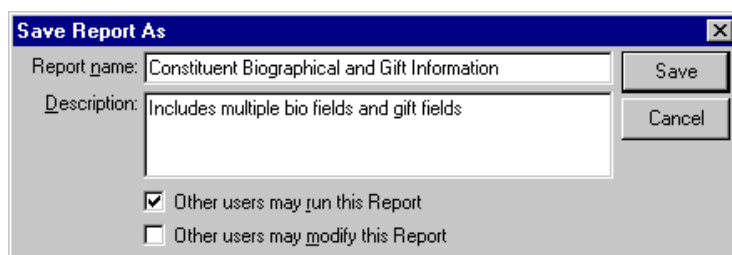
16. If you want to authorize other users to run this pivot report, mark the **Other users may run this Report** checkbox.

17. If you want to authorize other users to change your pivot report, mark the **Other users may modify this Report** checkbox.

18. To return to the General tab, click **Save**.
19. To return to the Reports page, select **File**, **Close** from the menu bar.

Customizing Pivot Reports

The flexibility in **Pivot Reports** allows you to customize and manipulate data to meet your reporting needs. You can drill down to the most specific details, or you can display a broad overview. You can add or remove data, rearrange the layout of data by changing fields, and format how information is displayed using the PivotTable Property Toolbox.

The following section contains the basic procedures necessary to customize pivot reports.

Adding and Removing Data

Note: If you need additional information from your database that is not included in the field list, you can edit the query to include this information.

If you decide you need more or less information in your report, you can always add or remove data fields. The PivotTable Field List displays the data fields available from the query. Fields in this list that are not bold are available but not yet displayed in the pivot report.

When you remove a field from the layout of a pivot report, data from the field is no longer displayed. However, the field remains available in the PivotTable Field List and you can always add it back again.

Fields can be used in only certain drop areas determined by the type of data the field contains. Use only total fields in the Drop Totals or Detail Fields Here area of the pivot report. Use all other fields in the filters, rows, and columns drop areas.

Each drop area in the report is labeled with the type of fields it accepts. As you drag a field over the drop areas, those that accept that type of information turn blue. An icon appears, indicating if a drop area does not accept that type of information. Once you move fields to all the areas, the drop area outlines and captions are not visible, but you can still move fields to these areas.

▶ **Adding data to pivot reports**

Note: From the Field List you can also add fields to the drop areas by highlighting the field to add, selecting the drop area, and clicking **Add to**.

1. On the Pivot Reports page, highlight an existing pivot report, and click **Open** on the action bar.
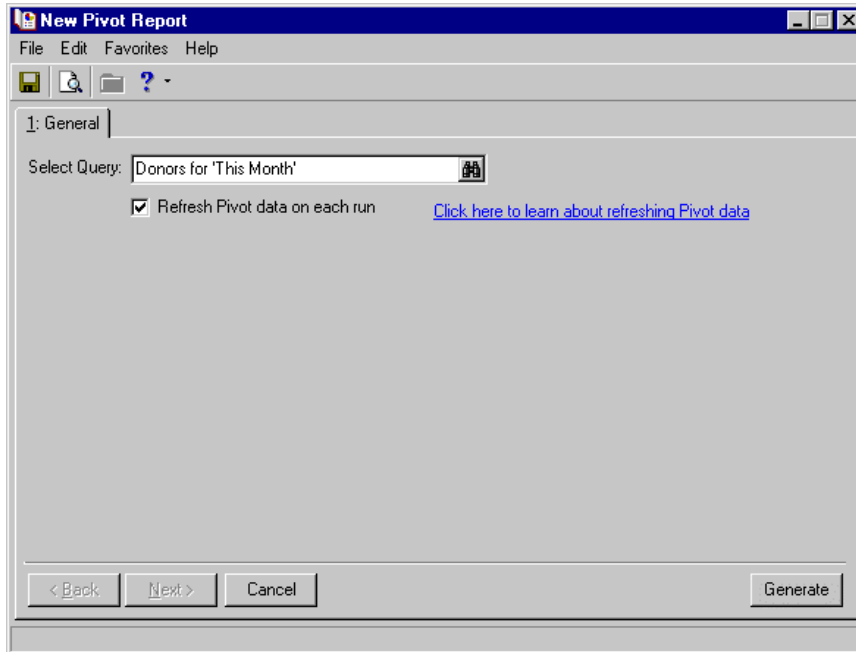
2. On the General tab, click **Generate**. The pivot report results appear.

3. Select fields in the list and drag them to the appropriate drop area, and drop total fields in the Drop Totals or Detail Fields Here area.

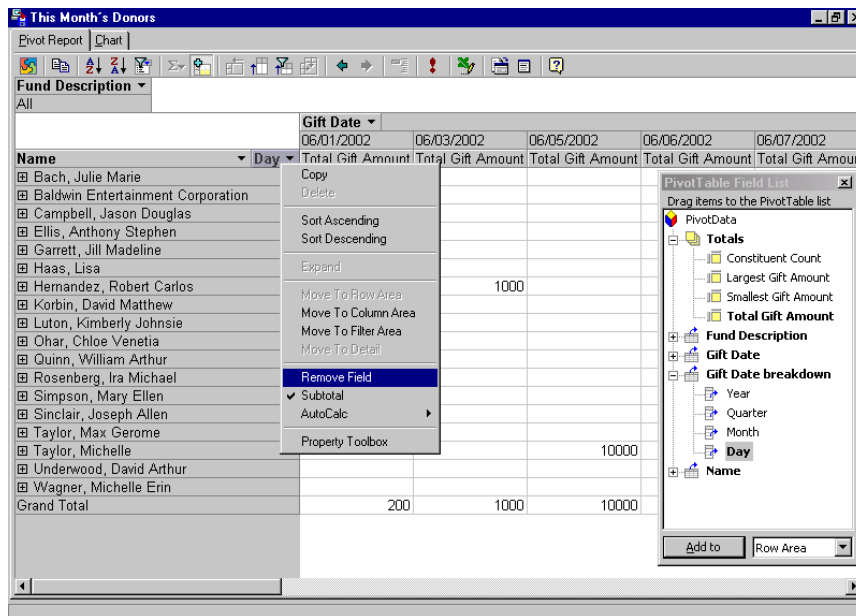4. Drop all other fields in the filters, rows and columns fields.

5. To save your changes, click **Save** on the *Raiser's Edge* toolbar. You can do this without closing the Pivot Report screen.

6. To close the report, select **File**, **Close** from the menu bar.

▶ **Removing data from pivot reports**

Tip: You can also remove a field by selecting and dragging it off the screen. The field returns to the PivotTable Field List.

1. From an open pivot report, right-click the field label of the field you want to remove from the pivot report and select **Remove Field** from the menu.

The field returns to the PivotTable Field List.

2. To save your changes, click **Save** on the *Raiser's Edge* toolbar. You can do this without closing the Pivot Report screen, if you want to continue to view your report.

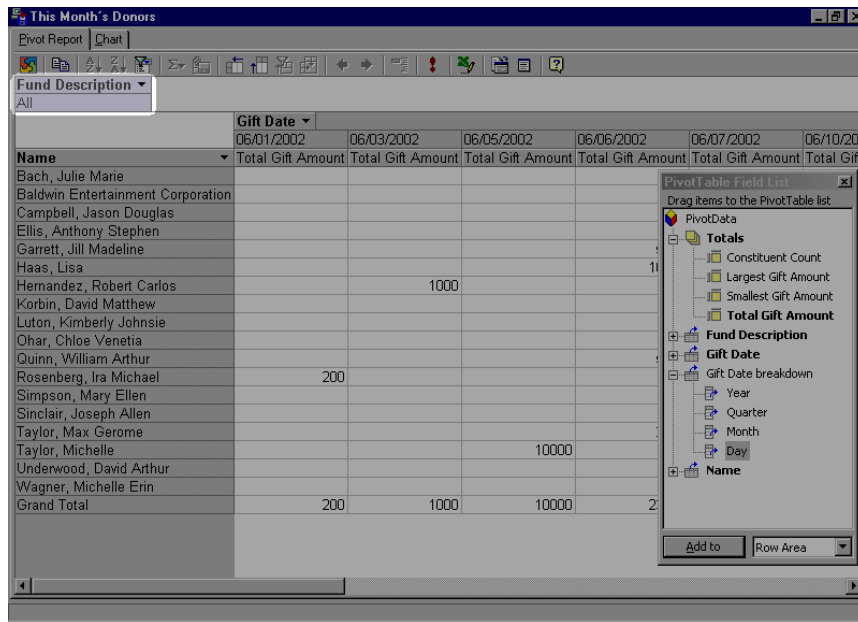3. To close the report, select **File**, **Close** from the *Raiser's Edge* menu bar.

Changing the Layout

With **Pivot Reports**, you can rearrange the layout of information an unlimited number of times to view your data from different perspectives. By "pivoting" information to different rows and columns, you can view different summaries of the information or focus in on a different area of interest. You can also arrange the layout of fields to format a chart using data in the report. For more information about creating charts, see "Pivot Reports Charts" on page 160.
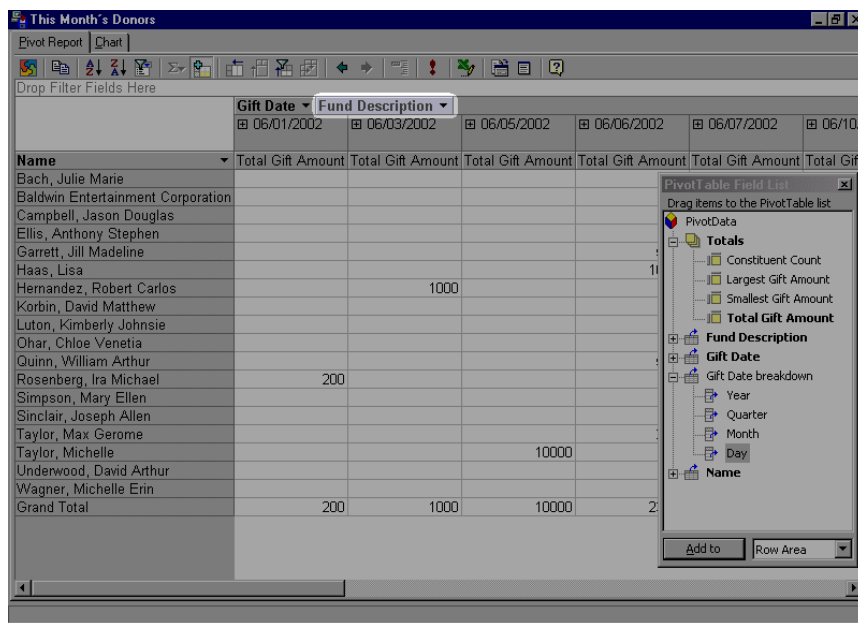
▶ **Moving fields to different drop areas**

Tip: You can also move row and column fields by selecting the field label and clicking the **Move to Row/Column/Filters Area** button.

1. From an open pivot report, select the field label for the field you want to move.

2. Drag and drop the field in the new drop area.

3. To save your changes, click **Save** on the *Raiser's Edge* toolbar. You can do this without closing the Pivot Report screen, if you want to continue to view your report.

4. To close the report, select **File**, **Close** from the *Raiser's Edge* menu bar.

▶ **Changing column orders**

Note: To close the PivotTable Field List screen, select the "X" in the top right corner of the screen.

1. From an open pivot report, select the field label for the column you want to move.

Tip: When you have multiple column fields, you can change the order of fields by highlighting the field to change, and then clicking the **Promote** or **Demote** buttons on the toolbar.

2. Drag the column to the right or left.

3. To save your changes, click **Save** on the *Raiser's Edge* toolbar. You can do this without closing the Pivot Report screen, if you want to continue to view your report.

4. To close the report, select **File**, **Close** from the *Raiser's Edge* menu bar.

▶ **Hiding drop areas**

Note: When the drop areas are hidden and the pivot report does not already have any row, column, data, or filter fields, you cannot drag fields to these areas. However, you can still add and move fields by using the buttons on the Pivot Report toolbar.

1. From an open pivot report, click **Property Toolbox** on the toolbar.

2. If the Show/Hide section is not expanded, click the Show/Hide bar.
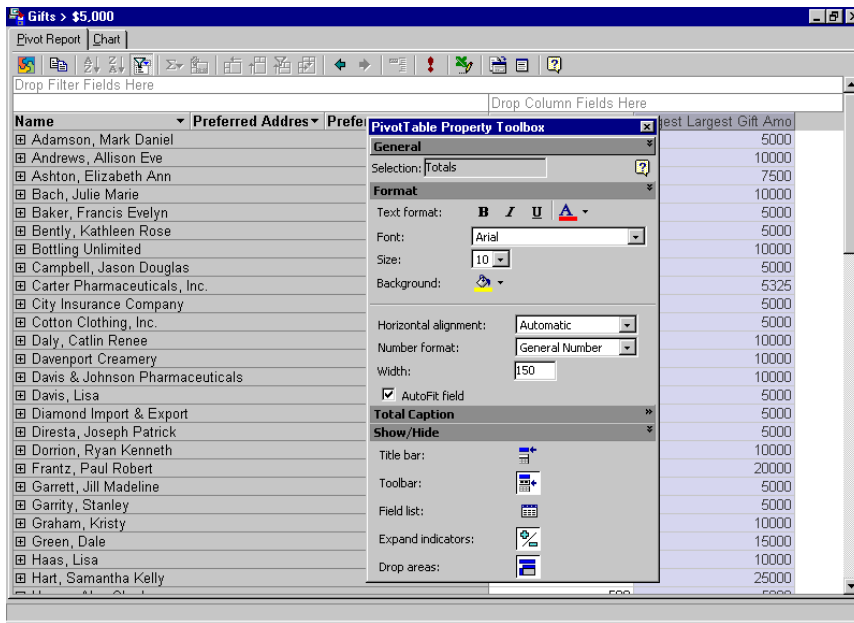
Note: Drop areas include the Drop Filter Fields Here, Drop Column Fields Here, and Drop Row Fields Here areas.

3. Click the **Drop areas** button so it is not active. All drop areas with no fields added are removed from the report.

4. To save your changes, click **Save** on the *Raiser's Edge* toolbar. You can do this without closing the Pivot Report screen, if you want to continue to view your report.

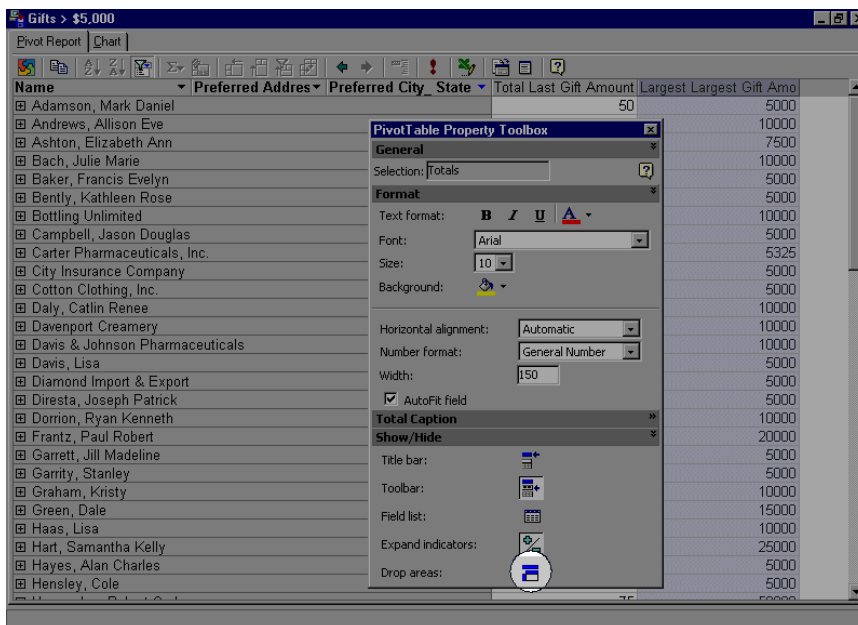5. To close the report, select **File**, **Close** from the *Raiser's Edge* menu bar.

Formatting With the PivotTable Property Toolbox

Note: To display the toolbox, click the **Property Toolbox** button on the toolbar.

The PivotTable Property Toolbox contains options and settings for displaying information in the report. The toolbox is divided into sections, each with a bar that displays the name of the section. For example, in the Format section, you can use word processing tools to format the font, size, color, and alignment of text in the selected area. In the Show/Hide section, you can show or hide areas of the report such as the toolbar, field list, and drop areas. Click a section's name bar to hide or display that section in the toolbox.

The options available in the toolbox change depending on the area of the report you select. For more information about the PivotTable Property Toolbox, click Microsoft's **Help** on the Pivot Report toolbar.
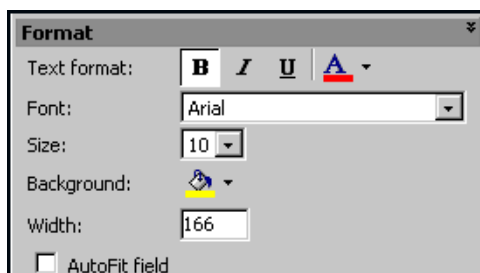
General

Warning: The options available in the toolbox change depending on the area of the report you select.

Selection. The **Selection** field identifies the selected area of the report to which settings and options in the toolbox apply. For Microsoft help on PivotTables, click the question mark icon.

Format

Note: To hide or display a section in the toolbox, click the section's name bar.

Text format. In the **Text format** field, use the word processing buttons to bold, italicize, or underline the text in the selected area. You can also change the color of the text.

Font. In the **Font** field, select the font to use.

Size. In the **Size** field, select the font size to use.

Background. In the **Background** field, select the color of the background.

Horizontal alignment. In the **Horizontal alignment** field, select the alignment of the text within a area.

Note: Changing the number format does not change the actual values, only how the values are displayed.

Number format. In the **Number format** field, select from several predefined number formats. For example, you can display a number as currency or as a percentage.

Width. In the **Width** field, select the width of the column.

Warning: The options available in the toolbox change depending on the area of the report you select.

AutoFit field. To set the column width to the width of the label name, mark the **AutoFit field** checkbox. If you make changes to a column's width, you can mark this checkbox to restore the original width.

Captions
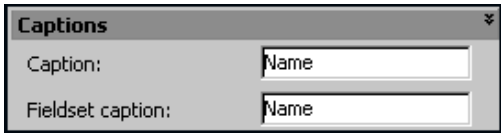
Caption. In the **Caption** field, you can edit or overwrite the label name for the selected area.

Fieldset caption. This option appears for all data fields except **Totals**. In the **Fieldset caption** field, you can edit or overwrite the name that appears on the PivotTable Field List screen.

Alignment within rows. For Totals data fields, you can select the alignment of subtotals and grand totals in the **Alignment within rows** field.

Show/Hide
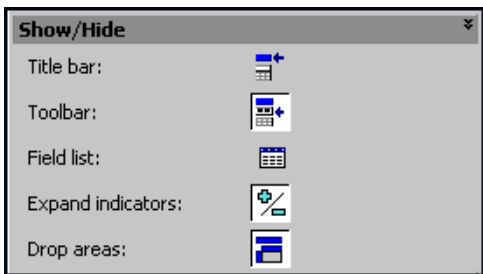
Note: Buttons for displayed items are white. Buttons for hidden items are gray.

To display an item in the Show/Hide section, click the button to the right of the field. The button background turns white to indicate the item is displayed.

**Title bar.** Click this button to display the title bar.

Tool bar. Click this button to display the tool bar.

Field list. Click this button to display the PivotTable Field List screen.

Expand indicators. Expand indicators are the + and - boxes that appear next to items of data in fields. You can use these to change the level of detail displayed for each item. Click this button to display expand indicators.

Drop areas. Click this button to display the outlines of drop areas.
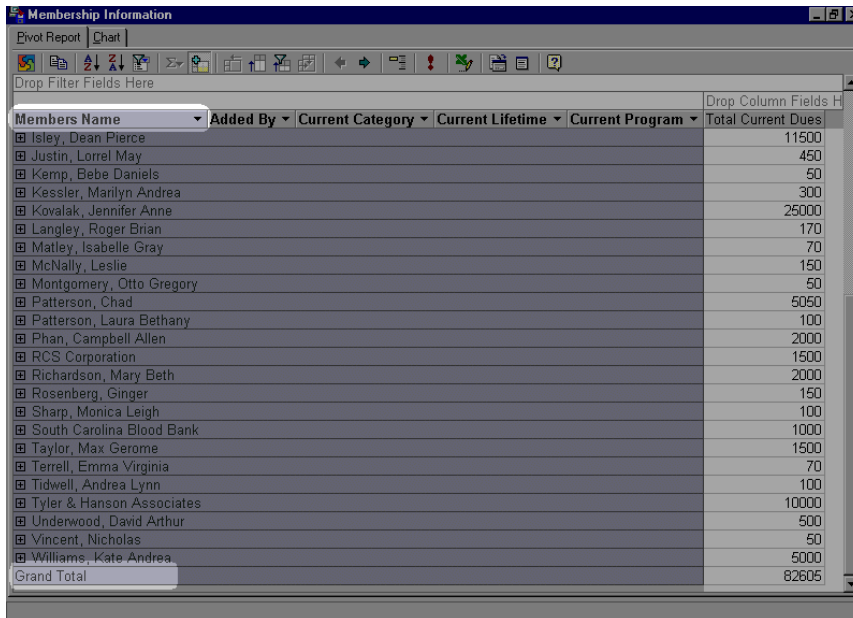
Sort
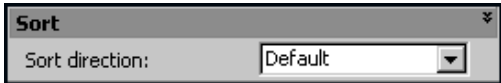
Sort direction. This option appears for column and row fields only. In the **Sort direction** field, you can sort items in ascending or descending order.

Using Totals in a Pivot Report

Total field values are precalculated by *The Raiser's Edge* to provide summarized values for the pivot report. When a report contains a total field, it automatically displays subtotals and grand totals for each row and column field you add. If you do not want this information displayed, you can move or hide subtotals and grand totals. If you move a field with subtotals or grand totals out of the row or column area, the subtotals or grand totals become hidden. However, if you move the field back to the row or column area, the subtotals or grand totals display again. Data hidden in filtered fields is always excluded from totals. However, you can set an option to include or exclude hidden data in subtotals and grand totals. For more information, see "Hiding subtotals or grand totals for a field" on page 153.
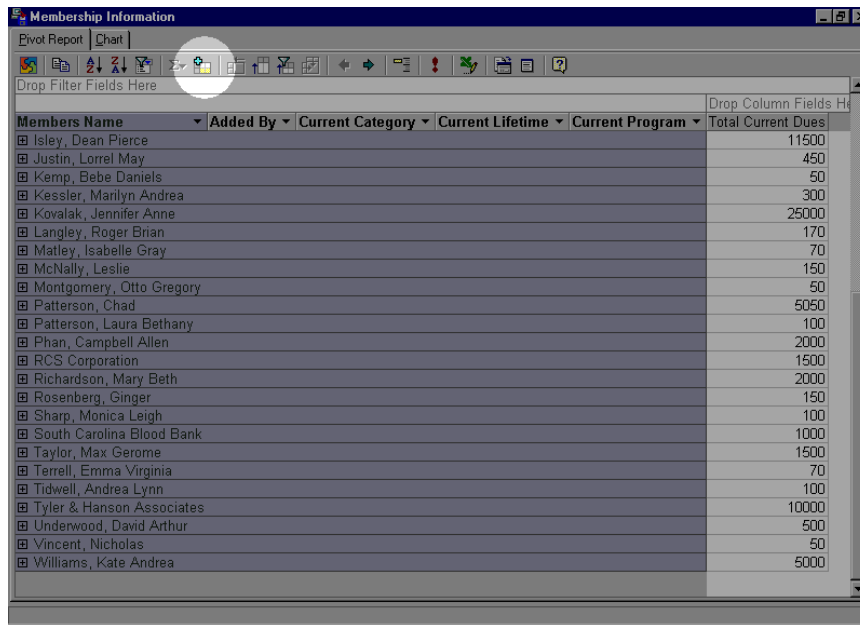
▶ **Hiding subtotals or grand totals for a field**

1. From an open pivot report, select the row or column field for which you want to hide subtotals or grand totals.

2. Click the **Subtotal** button on the toolbar so it is no longer active. The grand totals and subtotals are removed from the report.

3. To save your changes, click **Save** on the *Raiser's Edge* toolbar. You can do this without closing the Pivot Report screen, if you want to continue to view your report.

4. To close the report, select **File**, **Close** from the *Raiser's Edge* menu bar.

Finding and Sorting Data in Pivot Reports

You can filter and sort fields in a pivot report to find specific data values. Filtering is particularly helpful when a pivot report has a large amount of information and you want to focus on only the specific areas you need. You can sort data in columns and rows to make values easier to find.

Filtering Data

You can filter fields in the row, column, and totals area. When you filter a field, you select one or more items of data in the field you want to display, and you hide the other items. To further narrow the focus of the list, you can filter more than one field at a time. Filtering by selection (displaying only data that matches the value in a selected area) is particularly useful for fields in the totals area, when you want to view all of the rows that contain a particular value. You can tell if a field is filtered because the drop-down arrows for the filtered fields are blue instead of black.

You can use the filters drop area to filter the entire pivot report. When you select an item in the filter field drop-down list, the report displays data for that item only. You can select to filter by different items in the filter field, add new filter fields to the pivot report, or move existing fields to the filter area. When you select a different item for a filter field, the data displayed and calculated in the entire pivot report changes.

You can always remove filtering to display all data for all fields in a pivot report. The filter settings are retained so that when you turn filtering back on, the previous filters apply and the same data is displayed and hidden again. Filter settings are also retained when you move fields to change the layout of the pivot report. However, if you begin making new filter settings with filtering turned off, your previous settings are cleared.

▶ **Filtering by selection**

Note: Filtering by selection (displaying only data that matches the value in a selected area) is useful for fields in the totals area. For example, from your **Total Gift Amount** column, you can view only the total gift amounts for constituents who are *not* solicitors by selecting **Filter By Selection**.

1. From an open pivot report, right-click the Drop Row Fields Here area or Drop Column Fields Here area that contains the value you want to filter by, and then select **Filter By Selection** from the menu.

Note: When the drop-down arrow next to the field label is blue, you can tell items in a field are hidden by filtering.

All other fields that do not match the selected value are removed from the pivot report.

> **Note**: Because **Grand Total** is calculated automatically in a pivot report, this field continues to display, even when you select another field using **Filter by Selection**.

To restore the original data, click the blue drop-down arrow. A screen appears allowing you to mark checkboxes next to fields you want to restore.

2. To save your changes, click **Save** on the *Raiser's Edge* toolbar. You can do this without closing the Pivot Report screen, if you want to continue to view your report.

3. To close the report, select **File**, **Close** from the *Raiser's Edge* menu bar.

▶ **Filtering a field**

1. From an open pivot report, click the down arrow for the field you want to filter. A box appears, listing all items of data in that field.
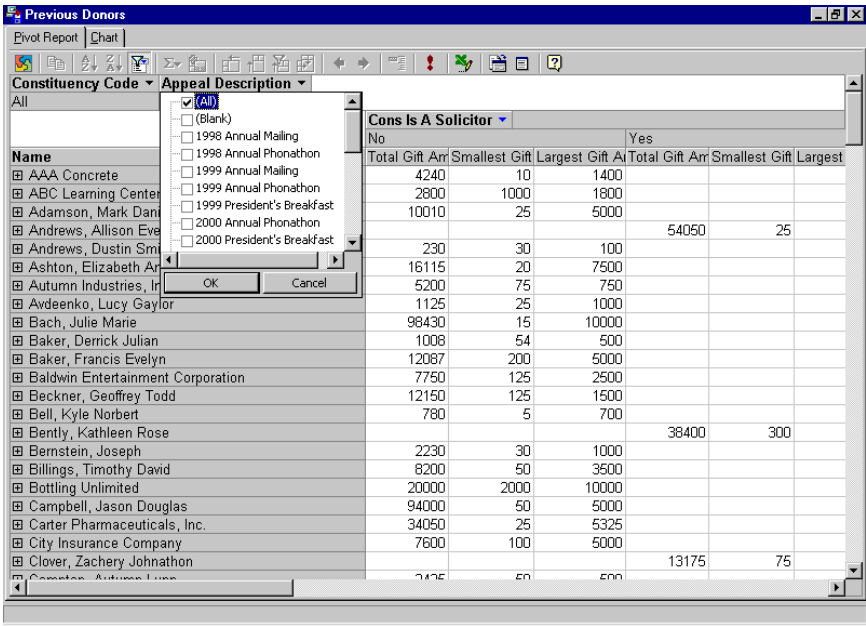
> **Note**: If you select to filter a field in the Drop Filter Fields Here area, you can only filter one item at a time. Using this example, the **Appeal Description** field is in the Drop Filter Fields Here area. Therefore, you can only filter one appeal at a time. If the **Appeal Description** field is in the Drop Row Fields Here area or the Drop Column Fields Here area, you can filter by multiple appeals at a time.

2. Mark the checkboxes for the items you want to display, and unmark the checkboxes for the items of data you want to hide.
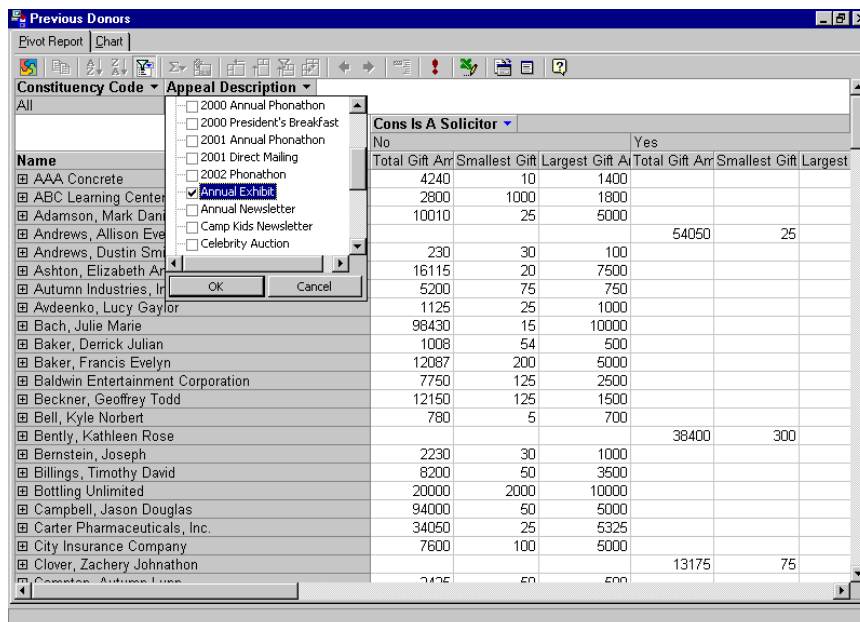
3. To display or hide all the data for a field, mark or unmark **All** (if the field is in the Drop Filter Fields Here area or **Show All** (if the field is in the Drop Row Fields Here or Drop Column Fields Here area).

4. Click **OK**. All items you marked appear in the field. All others are removed.

5. To save your changes, click **Save** on the *Raiser's Edge* toolbar. You can do this without closing the Pivot Report screen, if you want to continue to view your report.

6. To close the report, select **File**, **Close** from the *Raiser's Edge* menu bar.

▶ **Removing filters to display all data**

Note: If you do not want to retain filter selections, make sure the **AutoFilter** button is not active when you select items to filter. If the button is not active, selecting new items to filter automatically turns filtering on and removes your previous filter settings.

1. From an open pivot report, click **AutoFilter** on the toolbar so that the button is not active.

All filters are removed and all field items display.

2. If you click **AutoFilter** again, the previously set filters are restored. In this example, notice the **No** column no longer displays in the report results.

3. To save your changes, click **Save** on the *Raiser's Edge* toolbar. You can do this without closing the Pivot Report screen, if you want to continue to view your report.

4. To close the report, select **File**, **Close** from the *Raiser's Edge* menu bar.

Sorting Data

You can sort data in columns and rows to make values easier to find. For example, if you display constituent name, you can sort the **Name** field in ascending or descending order. You can sort by more than one column in a report, but you must sort each column individually.

▶ **Sorting in a field**

1. From an open pivot report, select the items to be sorted.

   - To sort the data in a field based on the field name, select the field name in the row heading or column heading of the field you want to sort. For example, to sort by constituent name, select **Name** in the column heading.

   - To sort the data in a field based on the summary values in a column, select the area in the column that contains the values by which you want to sort. For example, to sort by the total gift amount, from largest to smallest, select a area in the **Total Gift Amount** column.

Note: If you select to sort a grand total value in the bottom row of the pivot report, the columns sort instead of the rows.

   - To sort the data in a field by subtotal or grand total values, select the subtotal or grand total calculated value for the field you want to sort. For example, to sort by constituents; grand total amounts, select a area in the **Grand Total** row.

2. To sort the field in A-Z 0-9 order, click **Sort Ascending** on the Pivot Report toolbar.

Note: To undo the sort and return to the previous order, click the **Sort Ascending** or **Sort Descending** button again so that the button is not active.

3. To sort the field in Z-A 9-0 order, click the **Sort Descending** button on the Pivot Report toolbar.

4. To save your changes, click **Save** on the *Raiser's Edge* toolbar. You can do this without closing the Pivot Report screen, if you want to continue to view your report.

5. To close the report, select **File**, **Close** from the *Raiser's Edge* menu bar.

Pivot Reports Charts

You can use the data in your pivot report to generate a chart of the same information. When creating a pivot report that you want to use to generate a chart, keep in mind that at least one total field and one row or column field are required. The total fields provide the chart data, and the row and column fields make up the category and series data in the chart.

When you make changes to a pivot report, the chart based on the report is automatically updated to reflect the changes. For example, if you move a field to the row or column area, the chart is automatically updated to reflect the field as either category or series data. Or, if you filter the data or remove a field from report, the field information is removed from the chart.

▸ **Viewing pivot report charts**

1. From an open pivot report, select the Chart tab. The chart appears.
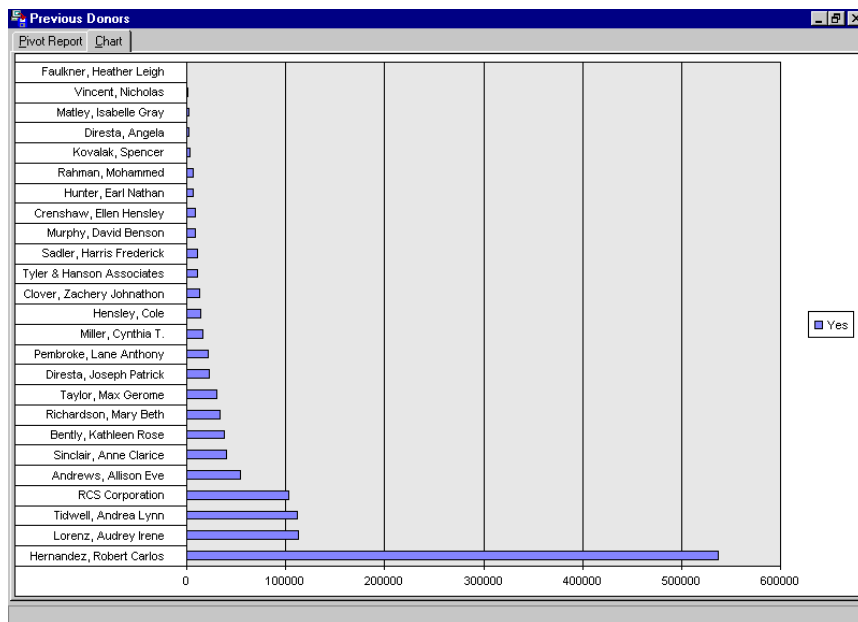
2. After viewing the chart, select the Pivot Report tab to return to the pivot report and make any necessary changes.

3. To save your changes, click **Save** on the *Raiser's Edge* toolbar. You can do this without closing the Pivot Report screen, if you want to continue to view your report.

4. To close the report, select **File**, **Close** from the *Raiser's Edge* menu bar.

Exporting a Pivot Report to Excel

With the click of a toolbar icon, you can export your pivot report to *Excel*. Because you cannot print your report from Microsoft's Pivot Report screen, exporting the report to *Excel* for printing purposes is a simple and quick solution.

▶ **Exporting a pivot report to Excel**

1. From an open pivot report, click **Export to Excel** on the toolbar. If your pivot report contains hidden fields, a message appears, informing you that any hidden fields in the pivot report export to *Excel*.
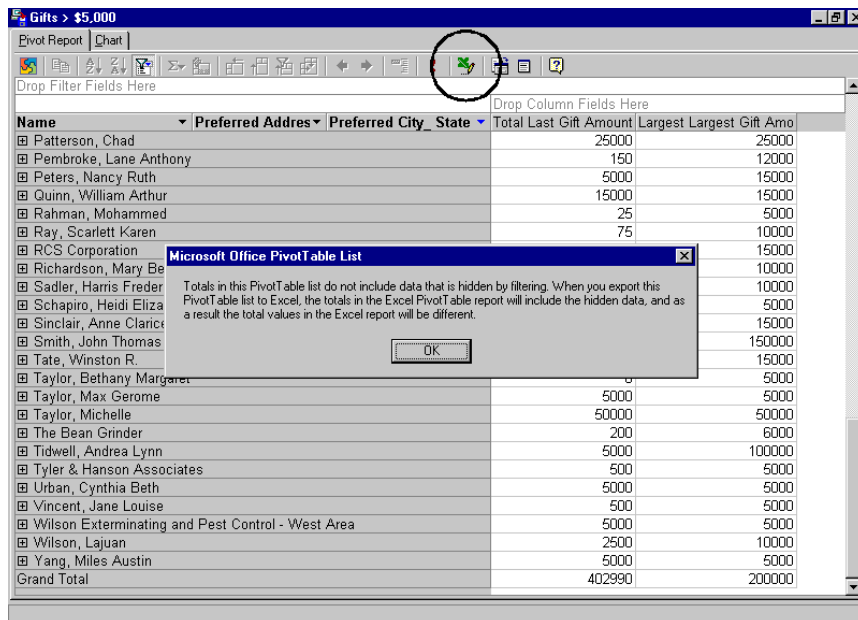
> **Warning**: Pivot report results are automatically Read-Only in *Excel*. To edit the report, go back to Microsoft Pivot Report screen.

2. Click **OK**. *Excel* opens automatically, and a report similar to your pivot report results displays.
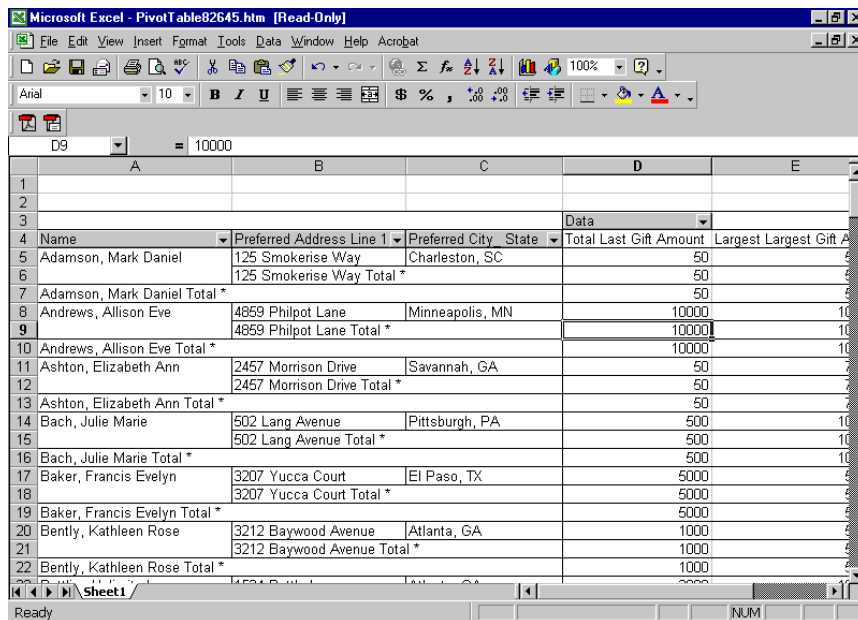
3. From the menu bar, select **File**, **Print** to print the report.

4. From the menu bar, select **File**, **Close** to close *Excel* and return to the Pivot Report screen.

5. To save your changes, click **Save** on the ***Raiser's Edge*** toolbar. You can do this without closing the Pivot Report screen, if you want to continue to view your report.

6. To close the report, select **File**, **Close** from the ***Raiser's Edge*** menu bar.

Microsoft Outlook Integration

Procedures

The Raiser's Edge can integrate constituent, action, appeal, and (if you have the optional module *Event Management*) event records with your Microsoft *Outlook* contact, calendar, and task records. You can synchronize the two programs so that records from one program are linked to existing or new records in the other program. Once records are linked, when you modify the record in one program, the record is automatically updated in the other whenever you synchronize the programs.

> **Note**: To use the Microsoft *Office* Integration features through a terminal session, *Office* must be installed on the Terminal or Citrix Server and published out to users.

When you integrate the two programs, constituents you add to *The Raiser's Edge* can be included in *Outlook* as contacts. Additionally, actions and events you establish in *The Raiser's Edge* can appear as calendar and task records in *Outlook*. You can also select *Outlook* contact, calendar, and task records and link them to new or existing records in *The Raiser's Edge*.

Quick Start

Using *Outlook Integration*, you can create links between records in *The Raiser's Edge* and *Outlook*. Once *Raiser's Edge* constituent, event, action, or appeal records are linked with contact, calendar, or task records in *Outlook*, you can synchronize the two programs so that when you make changes to a record in one program, those changes are automatically updated in the corresponding record in the other program.
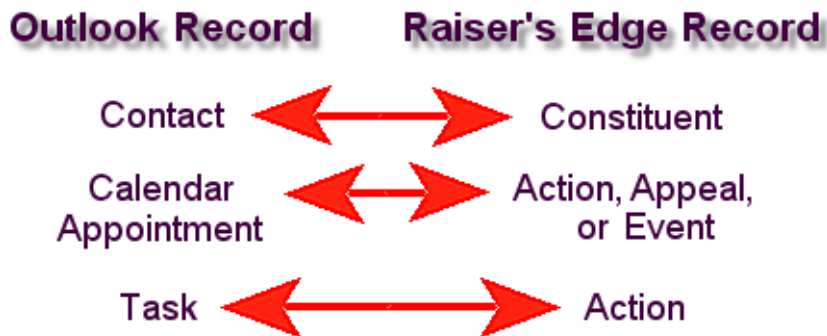
For more information about how *Outlook* record types correspond to *Raiser's Edge* records, see "Contact Records" on page 191, "Appointment Records" on page 202, and "Task Records" on page 208.

How Do I Access Outlook Integration?

> **Warning**: If you do not want to use Outlook Integration and do not want the buttons to appear in your *Outlook* toolbar, see "Removing the Raiser's Edge Outlook Integration components manually in Outlook" on page 175.

When you install **The Raiser's Edge**, the necessary files are included to automatically integrate with *Outlook*. After installation, you will notice several additional buttons on your *Outlook* toolbar. If the buttons do not appear on the *Outlook* toolbar, see "Troubleshooting Outlook Integration" on page 223.
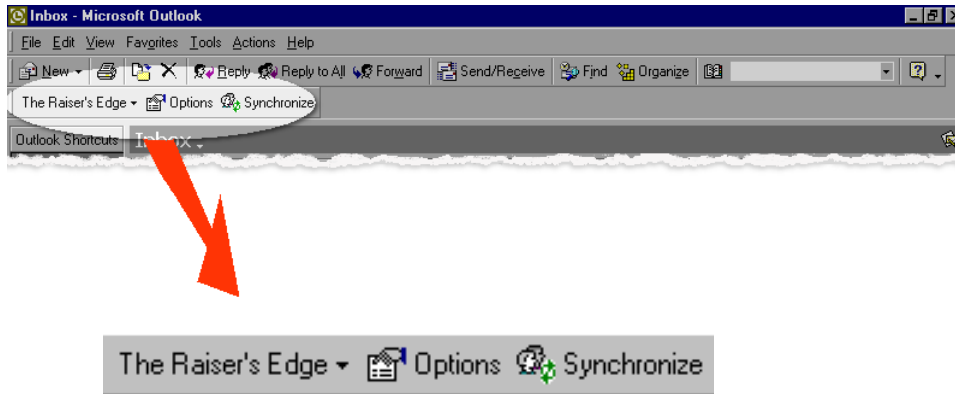
If you use *Outlook 2010*, the **Raiser's Edge** toolbar appears on the Add-Ins tab of the *Outlook* menu bar. You must first install the Microsoft *Outlook* add-in to see the **Raiser's Edge** toolbar. For information about how to install the Microsoft *Outlook* add-in see, "Adding the Raiser's Edge Outlook Integration components manually in Outlook 2010" on page 176.
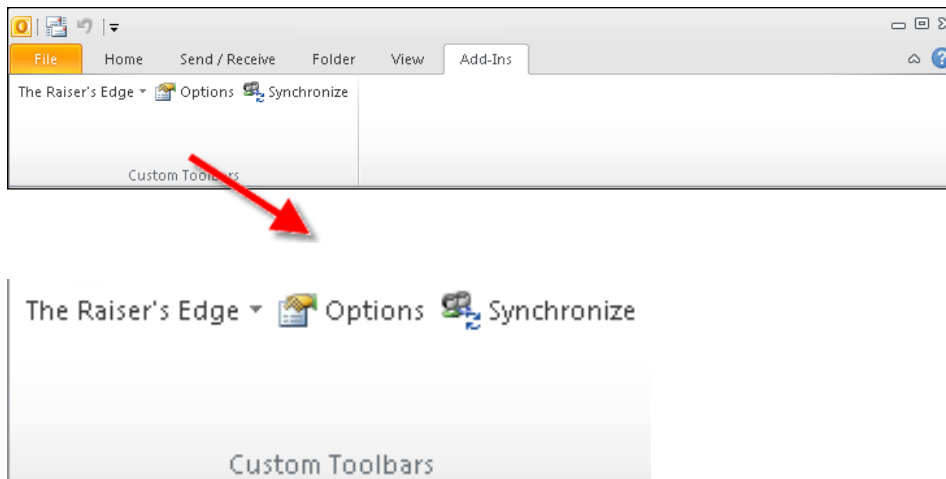
Setting Options

To get started, you should first set options for the integration. These options control such things as which **Raiser's Edge** records are linked to records in *Outlook*, and whether you want to preview changes before they are processed and actually entered into the database.

To access the Options screen, click **Options** on the *Raiser's Edge* toolbar. The Raiser's Edge Synchronization Options screen appears.
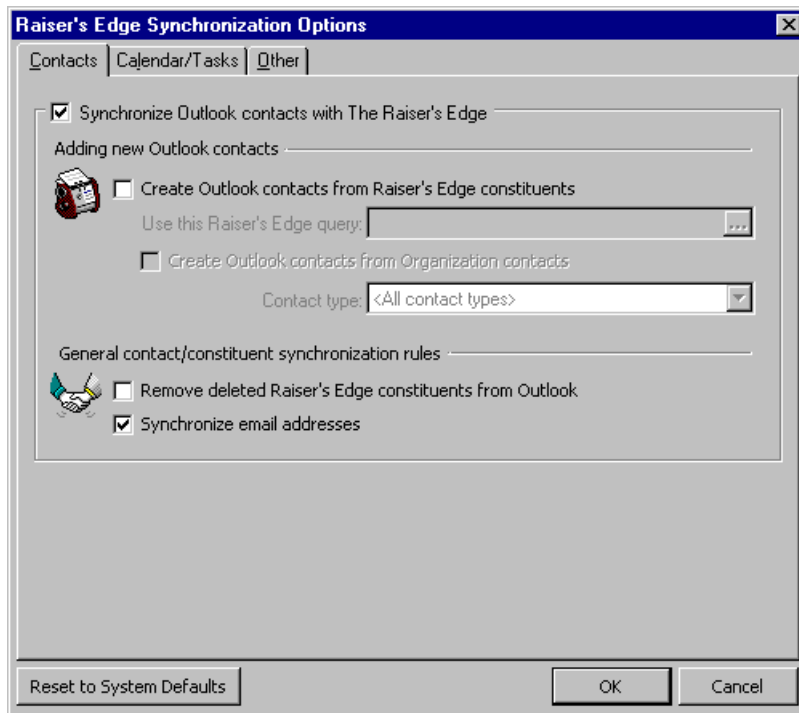
The Raiser's Edge Synchronization Options screen consists of three tabs. Settings on these tabs control functions related to linking records between the two programs. For example, on the Contacts tab, you specify that *Outlook* contact records be created and linked to *Raiser's Edge* constituent records based on a query.

It is important to note that no records are actually linked by setting these options. You are specifying what you want to happen when the two programs are actually synchronized.

For in-depth information about the options on these tabs, see "Outlook Synchronization Options" on page 178.

Adding and Linking Records

Note: You can link existing records in the two programs, or you can specify that existing records in one program be linked to new records you create in the other program.

Raiser's Edge records added to *Outlook* are determined by queries you select on the Raiser's Edge Synchronization Options screen. For example, on the Options screen if you select a dynamic query that includes all constituents to whom you are assigned as a solicitor, all these constituents are added as contacts in *Outlook* and the constituent records are linked to the corresponding contact records. Every time you synchronize the two programs, the *Raiser's Edge* query is updated to include any additional constituents for whom you have been added as a solicitor since the query was last run. These records are then added to *Outlook* as contacts and linked to *The Raiser's Edge*.

To link an *Outlook* record to a *Raiser's Edge* record, you must use the **Create Link** toolbar button from the selected *Outlook* record.
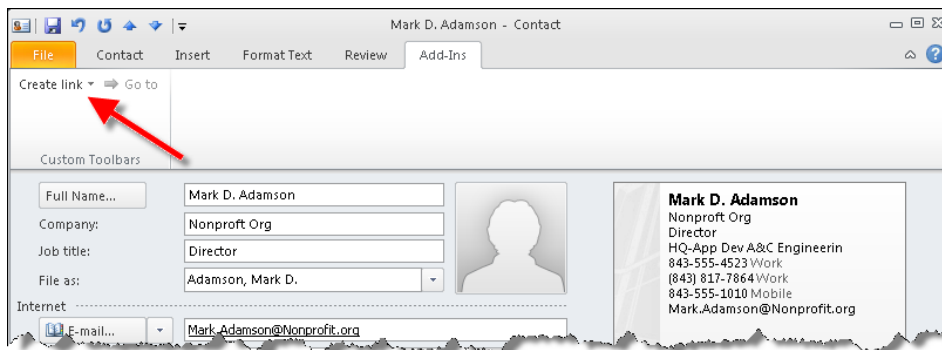
Links are created using the linking wizard for the specific *Outlook* record type. Using the wizard, you can link to an existing *Raiser's Edge* record, or to add a new record based on the information in the *Outlook* record and link to it.

Once you create a link between records, when you make a change in one program and synchronize, the corresponding record is updated in the other program.

Linking Wizard

The Linking wizard guides you through the process of linking *Outlook* records with *Raiser's Edge* records. When you click the **Create Link** toolbar button on an *Outlook* record, you must first specify the type of *Raiser's Edge* record you want to create or link with. Then, the linking wizard appears and guides you through the steps of specifying whether the *Outlook* record should be linked to an existing *Raiser's Edge* record, or if a new record should be created and linked.

For more information about the linking wizards for different *Outlook* records, see "Contact Linking Wizard" on page 192, "Appointment Linking Wizard" on page 202, and "Task Linking Wizard" on page 208.

What is Synchronization?

Synchronization is the process of updating records between **The Raiser's Edge** and *Outlook*. You can link to existing records in either program, or specify that existing records in one program be linked to new records you create in the other program.

You can synchronize records in a number of ways.

- Click **Synchronize** on the *Outlook* toolbar to synchronize records based on your selections on the Raiser's Edge Synchronization Options screen tabs.

- Work offline and specify that records be synchronized later. For example, you may add an *Outlook* contact to your laptop when you are not connected to the network on which **The Raiser's Edge** is installed. You can create a link for that record so the next time you are on the network, the contact record is added to **The Raiser's Edge** as a constituent.

- Specify on the Other tab of the Raiser's Edge Synchronization Options screen that records in the two programs automatically synchronize whenever you open *Outlook*.

For more information, see "Synchronizing The Raiser's Edge With Outlook" on page 186.

After records are linked in the two programs (for example, a **Raiser's Edg**e constituent is linked to a contact in *Outlook*), if changes are made to the records in both *Outlook* and **The Raiser's Edge**, a conflict is generated the next time you synchronize records. You need to resolve the conflict by determining which data to use in both records. For more information and other situations that can cause conflicts, see "Synchronization Conflicts" on page 189.

Installation Notes

The Raiser's Edge integrates with *Outlook 2000*, *XP*, *2003*, *2007,* or *2010*. The integration is not available with previous versions of *Outlook*.

Note: To use the Microsoft *Office* integration features through a terminal session, *Office* must be installed on the Terminal or Citrix Server and published out to users.

In most cases, **The Raiser's Edge** *Outlook* integration components are activated automatically as part of the **The Raiser's Edge** installation. However, in certain circumstances, you may need to install additional *Office* components, such as the "Office Collaboration Data Objects," or manually activate **The Raiser's Edge** components.

For more information about the Office Collaboration Data Objects, see the following section. For more information about manually installing **The Raiser's Edge** integration components, see "Manually Installing or Removing the Outlook Integration COM Add-In" on page 172.

Office Collaboration Data Objects (CDO)

Before you can use the *Office* Integration features of **The Raiser's Edge**, you must install the Collaboration Data Objects (CDO). During the default installation of *Office XP*, for example, the CDO are not installed.

If you do not have the CDO installed, each time you open *Outlook*, it will attempt to install the missing components. These components are available on your Microsoft *Office* CD.

Warning: If you use *2007*, you must download Collaboration Data Objects, version 1.2.1, from www.microsoft.com to be completely compatible with **The Raiser's Edge**.

If you click **Cancel** instead of installing the CDO, a message appears stating that you must install CDO before using **The Raiser's Edge** *Outlook* Synchronization. If you do not want to install the CDO, to stop *Outlook* from attempting to install them each time you open the program, you must remove the Raiser's Edge Outlook Integration COM Add-In. For more information, see the following section

Manually Installing or Removing the Outlook Integration COM Add-In

The Raiser's Edge integrates with *Outlook* through a "COM add-in." COM add-ins are executable files (.exe), or Dynamic Link Library files (.dll) that enable other software to interact with *Outlook*. In most cases, the Raiser's Edge Outlook Integration COM Add-In installs automatically. However, in some cases, you may need to install it manually.

One such instance may arise because *Outlook* integration by default is active only for the profile used to install *The Raiser's Edge*. You may have multiple users under different profiles on the same machine. For example, you may have volunteers who come in at different times and work on the same machine using different profiles. In this case, you must add the office integration COM manually for each of these profiles.

If you use Microsoft *Outlook 2010*, you must manually install the RE7Outlook.dll to integrate ***The Raiser's Edge*** and *Outlook*. For information about how to install this .dll file, see "Adding the Raiser's Edge Outlook Integration components manually in Outlook 2010" on page 176.

You can also remove the Raiser's Edge Outlook Integration COM Add-In if you want do not want to use its features and do not want ***The Raiser's Edge*** buttons to appear in your *Outlook* toolbar. For more information, see "Removing the Raiser's Edge Outlook Integration components manually in Outlook" on page 175.

▶ **Adding the Raiser's Edge Outlook Integration components manually in Outlook**

1. From the *Outlook* menu bar, select **Tools**, **Options**. The Options screen for *Outlook* appears.
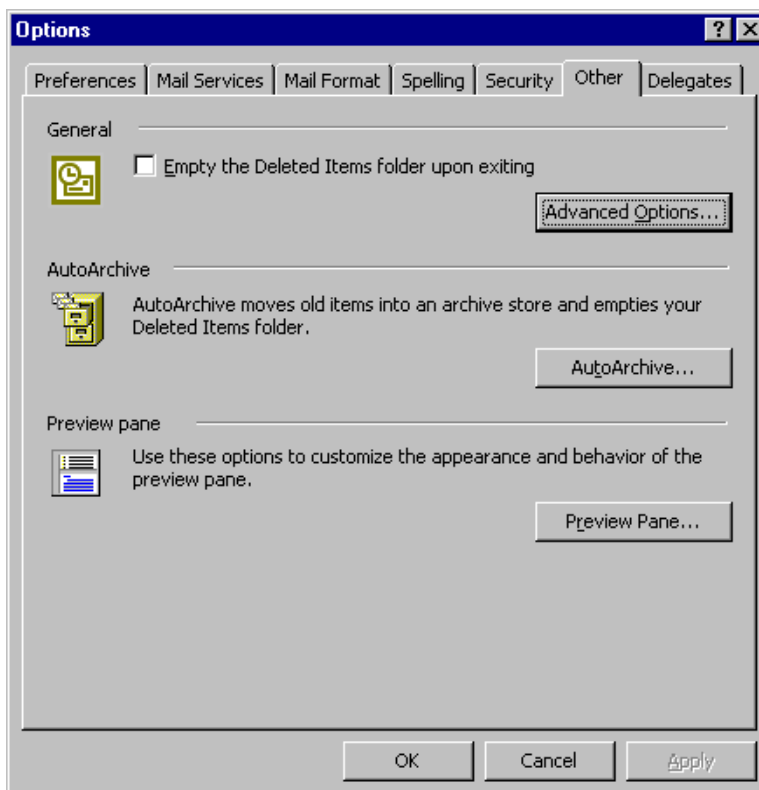
Note: If you use *Outlook 2007*, the steps in this procedure are slightly different. To begin, select **Tools**, **Trust Manager**. From the treeview on the left, select **Add-ins**. The Add-ins screen appears. At the bottom of the screen, in the **Manage** field, COM Add-ins appears. Beside the field, click **Go**. After you do this, go to step 5 in this procedure to complete adding the Raiser's Edge Outlook Integration components manually in *Outlook*.

2. Select the Other tab.

3. Under **General**, click **Advanced Options**. The Advanced Options screen appears.
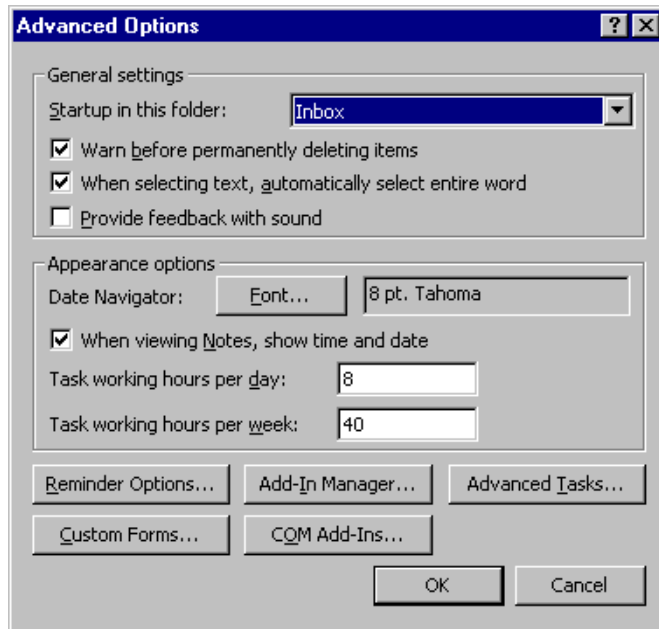
4. Click **COM Add-Ins**. The COM Add-Ins screen appears.
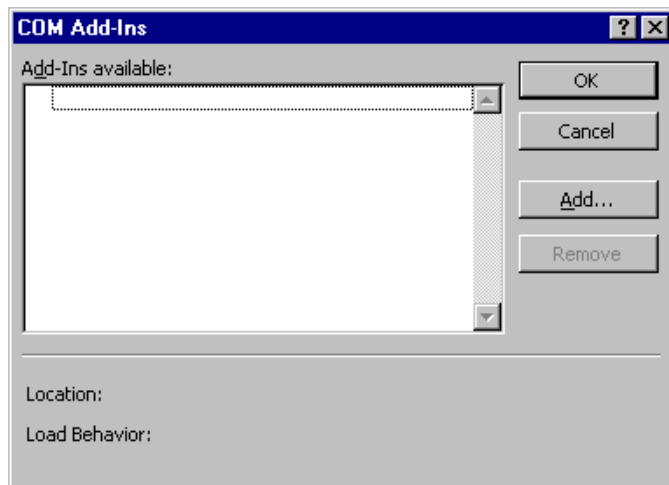
5. Click **Add**. A browse screen appears.

6. Browse to the directory where *The Raiser's Edge* is installed. In the RE7\DLL directory, select the RE7Outlook.dll file and click **OK**. The COM Add-Ins screen appears again.
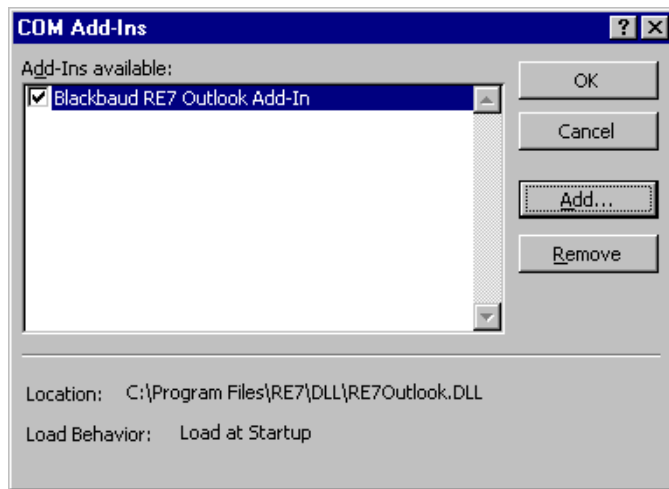
Note: If you use *Outlook 2007* and receive a message that Collaboration Data Objects (CDO) are not installed, you must download Collaboration Data Objects, version 1.2.1, from www.microsoft.com. These are also available on your Microsoft *Office* CD.

7. "Blackbaud RE7 Outlook Add-In" now appears in the **Add-Ins available** box. Make sure the checkbox is marked and click **OK**. The Raiser's Edge Outlook Integration buttons appear on the *Outlook* toolbar and you return to the Advanced Options screen.

8. Click **OK**. You return to the Options screen.

9. Click **OK**. You return to *Outlook*.

▸ **Removing the Raiser's Edge Outlook Integration components manually in Outlook**

1. From the *Outlook* menu bar, select **Tools**, **Options**. The Options screen for *Outlook* appears.
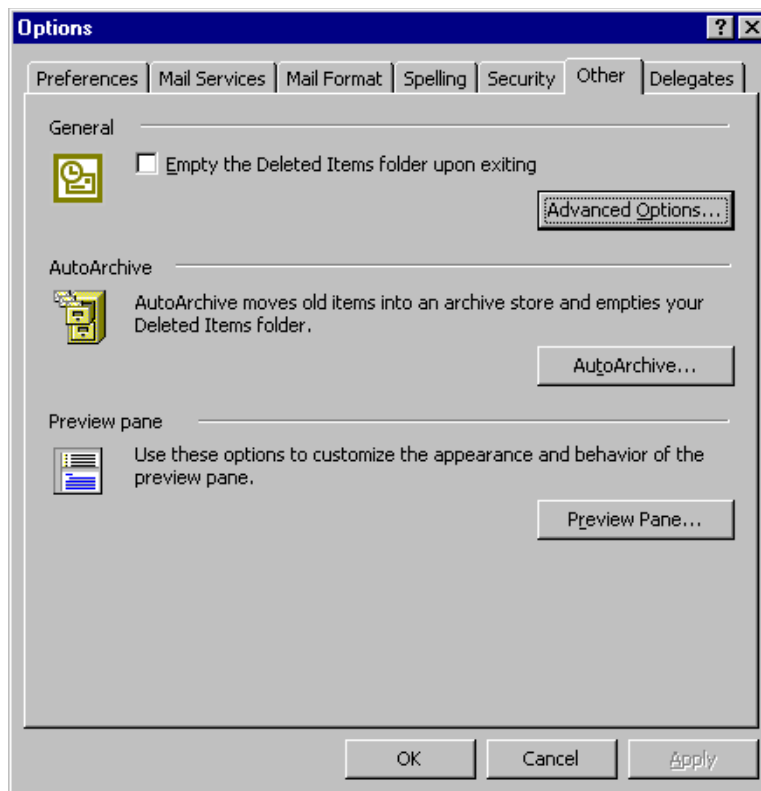
2. Select the Other tab.

3. Under **General**, click **Advanced Options**. The Advanced Options screen appears.
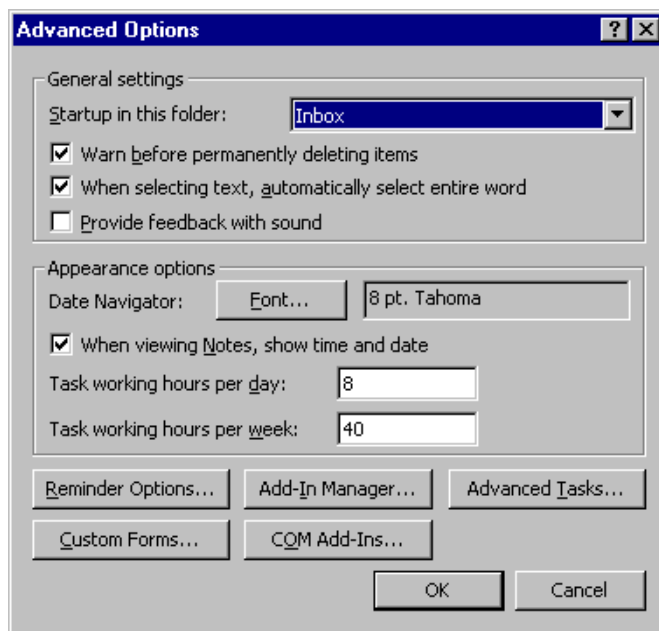
4. Click **COM Add-Ins**. The COM Add-Ins screen appears.
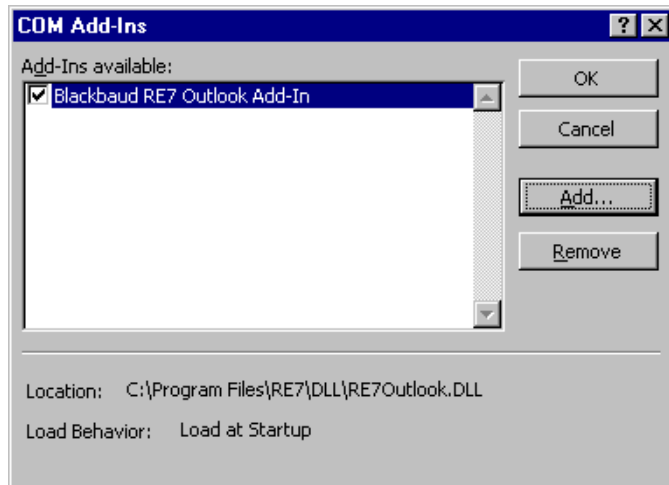
5. In the **Add-Ins available** box, select "Blackbaud RE7 Outlook Add-In". Click **Remove**.

6. Click **OK**. You return to the Options screen.

7. Click **OK**. You return to *Outlook*. The Raiser's Edge Outlook Integration is no longer available and the *Raiser's Edge* buttons do not appear on the *Outlook* toolbar.

▶ **Adding the Raiser's Edge Outlook Integration components manually in Outlook 2010**

1. From the *Outlook* menu bar, select **File**, **Options**. The Outlook Options screen appears.
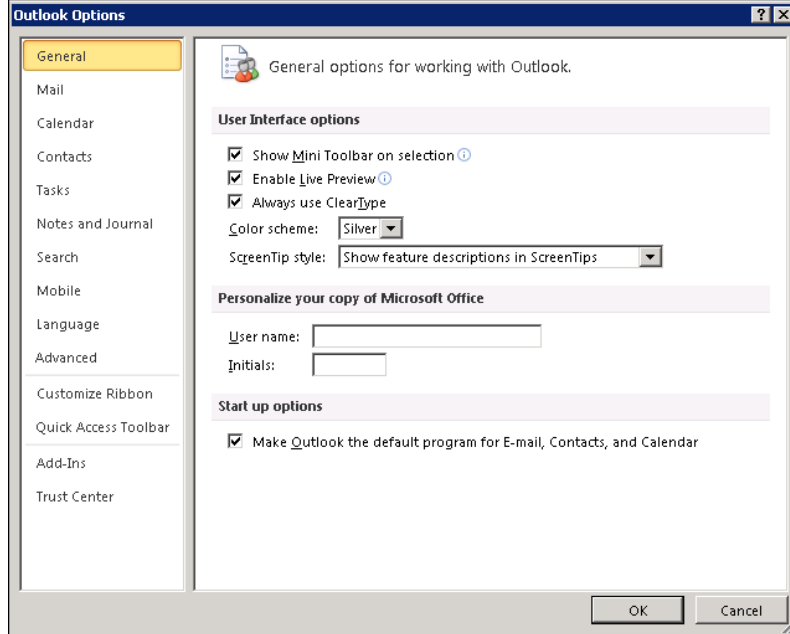
2. Select **Add-Ins**.
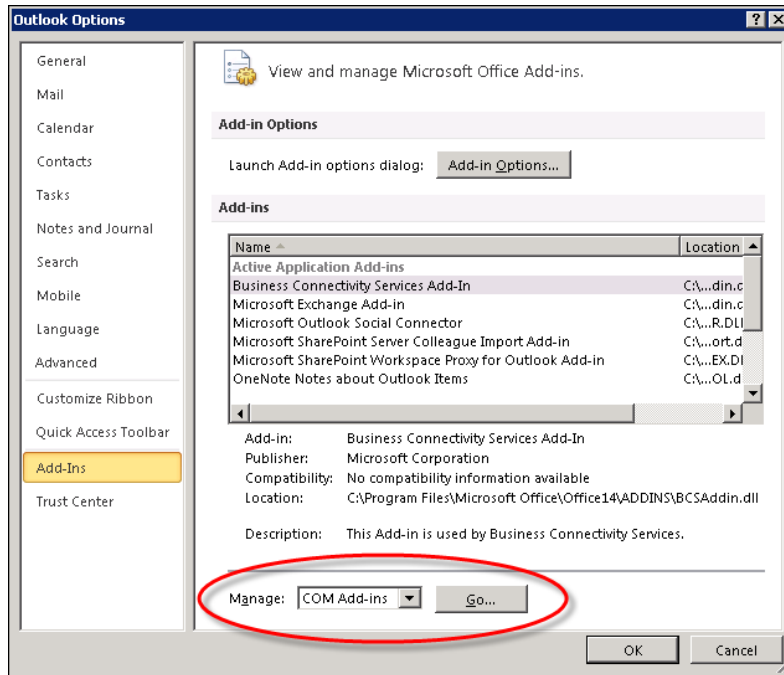
3. At the bottom of the screen, make sure **COM Add-ins** appears in the **Manage** field, then click **Go...** The COM Add-Ins screen appears.
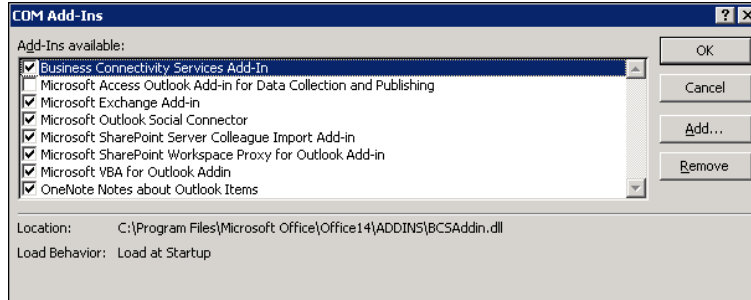
4. Click **Add**. The Add Add-In screen appears.

5. Browse to the directory where *The Raiser's Edge* is installed. In the DLL directory, select the RE7Outlook.dll file and click **OK**. The COM Add-Ins screen appears again, and Blackbaud RE 7 Outlook Add-In appears in the **Add-Ins available** grid.
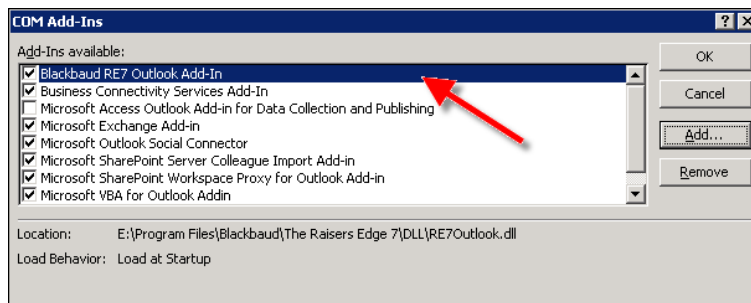
6. Click **OK**.

7. You return to Microsoft *Outlook 2010*, and the Add-Ins tab now appears on the *Outlook* menu bar.

Outlook Synchronization Options

From the Raiser's Edge Synchronization Options screen, accessed from the *Outlook* toolbar, you can set a variety of options to specify how records are created and linked when you synchronize the two programs. The screen consists of three tabs: Contacts, Calendar/Tasks, and Other.

> **Warning**: No records are actually linked from the Raiser's Edge Synchronization Options screen. On these tabs, you specify what you want to happen when the two programs are actually synchronized.

The selections you make on these tabs determine which records are added and updated in the two programs when you synchronize them. It is important to note that no records are actually linked by setting these options. You are specifying what you want to happen when the two programs are actually synchronized.

Synchronizing ensures that records in each program are up-to-date. For more information about synchronizing the two programs, see "Synchronizing The Raiser's Edge With Outlook" on page 186.

For information about which **Raiser's Edge** and *Outlook* fields are mapped to each other, see "Outlook Field Mappings" on page 220.

Contacts Tab

On the Contacts tab of the Raiser's Edge Synchronization Options screen, specify whether you want to create *Outlook* contacts from constituent records (based on a query), and whether you want to create *Outlook* contacts from **Raiser's Edge** organization contacts. You can also specify that contact records created from constituent records be deleted if the constituent record is deleted, and synchronize email addresses between linked contacts and constituents.

▸ **Specifying Contact synchronization options**

1. From the *Outlook* toolbar, beside **The Raiser's Edge** button, click **Options**. The Raiser's Edge Synchronization Options screen appears.

2. Select the Contacts tab.
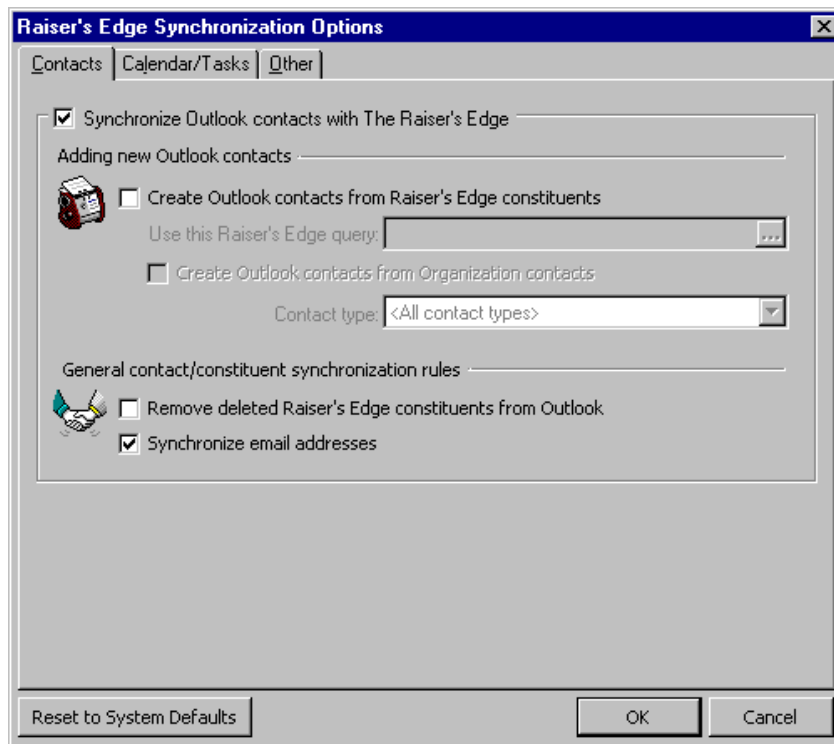
Warning: You can synchronize only with contacts in the default Contacts folder in *Outlook*. New contacts added through the integration are also placed in this folder. If you move linked contacts out of this folder, the connection with *Raiser's Edge* constituents is broken.

3. To enable synchronizing *Outlook* contacts with *Raiser's Edge* individual and organization constituents, and organization contacts, mark the **Synchronize Outlook contacts with The Raiser's Edge** checkbox. If you unmark this checkbox, this feature is not available and all other items on the tab are disabled.

Once records are linked, they remain synchronized even if you later unmark the **Synchronize Outlook contacts with The Raiser's Edge** checkbox. The checkbox only controls adding new records to *Outlook* from *The Raiser's Edge* during synchronization. You must break an established link manually. For more information, see "Breaking Links Between Outlook and Raiser's Edge Records" on page 219.

4. Under **Adding new Outlook contacts**, when you mark the **Create Outlook contacts from Raiser's Edge constituents** checkbox, new constituents you add in *The Raiser's Edge* are automatically added as contacts in *Outlook*. These constituents are determined by a query.

In the **Use this Raiser's Edge query** field, you must specify a query to determine which constituent records are added as contacts. To select or create a query, click the ellipses to access the Open screen for queries. When you synchronize records, *The Raiser's Edge* updates the query, then looks at the query results and adds any records to *Outlook* that have not already been added.

Note: A dynamic query is useful here because it is automatically refreshed each time it is used. When you use a dynamic query, the program searches the database for any new records meeting the criteria you specify and adds them to the results.

For example, you may be the volunteer coordinator for your organization and want to add only volunteer constituents to your list of *Outlook* contacts. You can create a dynamic query that includes all constituents with a constituent code of "Volunteer" in your database to serve this purpose. Every time you synchronize the two programs, the query is run and updated with any new volunteers added to *The Raiser's Edge*. These new volunteers are then added and linked as contacts in *Outlook*.

An entry in the **Use this Raiser's Edge query** field is required when you mark the **Create Outlook contacts from Raiser's Edge constituents** checkbox.

Note: In *The Raiser's Edge*, individual relationships for an organization are specified as contacts by marking the **Contact** checkbox on the General 1 tab of the relationship record. You can then enter a **Type** for the contact, such as "Primary" or "Social".

5. When you mark the **Create Outlook contacts from Organization contacts** checkbox, any time an *Outlook* contact record is created and linked to an organization constituent based on your selected query, any individual relationships specified as contacts for the organization constituent are also added as *Outlook* contacts.

   To create *Outlook* contacts for only a certain type of **Raiser's Edge** organization contact, select an entry in the **Contact type** field. For example, you may want to create contacts only for Primary organization contacts in *The Raiser's Edge*.

Note: Although you can specify that *Outlook* contacts imported from **The Raiser's Edge** be deleted if no corresponding constituent record still exists, the reverse is not true. You cannot delete constituent records in *The Raiser's Edge* based on changes you make in *Outlook*.

6. Under **General contact/constituent synchronization rules**, when you mark the **Remove deleted Raiser's Edge constituents from Outlook** checkbox, any *Outlook* contacts that were imported from *The Raiser's Edge*, but no longer have a matching constituent, are deleted.

   Although you can delete *Outlook* contacts by marking this checkbox, the reverse is not true. You cannot delete a constituent from *The Raiser's Edge* based on any changes you make in *Outlook*.

   If you leave this checkbox unmarked, a conflict arises because the *Outlook* contact is linked to a constituent that no longer exists. Because of this, an "Edit Link" exception is generated when you synchronize. You can either re-link the record to another constituent, or select to break the **The Raiser's Edge** link for the contact. For more information about conflicts that cause exceptions during synchronization, see "Synchronization Conflicts" on page 189.

7. If you unmark the **Synchronize email addresses** checkbox, contact and constituent email addresses are not synchronized. *Outlook* security determines that every time another program attempts to automatically access *Outlook* email, a message appears informing you of what is happening. Whenever email addresses are involved in a synchronization, this message appears. If you unmark this checkbox, the security message does not appear because emails are not accessed.

   When synchronizing email addresses, if only one email address appears on a contact and on a constituent to which the contact is linked, the email address must be the same or you will have to overwrite one with the other during synchronization. Sometimes you may want to use different addresses. For example, you may want a home email address on the contact record and a business address on the constituent record. You can store both on each record by using the "E-mail 2" and "E-mail 3" entries in the contact record **E-mail** field. When you synchronize, "E-mail 2" and "E-mail 3" are added to the **Phone Types** table and stored on the constituent record.

   For existing **Raiser's Edge** **Phone type** email table entries to map automatically to the *Outlook* email fields, the **Raiser's Edge** type names must exactly match those in *Outlook*. For example, your table entries in *The Raiser's Edge* must be "E-mail," "E-mail 2," and "E-mail 3" (not "e-mail," "Email," or any other spelling variation).

8. To save your changes and close the Raiser's Edge Synchronization Options screen, click **OK**. If you want to close the Raiser's Edge Synchronization Options screen without saving any changes, click **Cancel**. To remove any changes you have made during this or any previous session, click **Reset to System Defaults**.

Calendar/Tasks Tab

Note: Actions require a contact record in *Outlook* to which to link the constituent. If you synchronize calendar entries or tasks with *The Raiser's Edge*, the program automatically creates contact records for constituents associated with actions, regardless of whether you select to synchronize contacts with *The Raiser's Edge*.

On the Calendar/Tasks tab of the Raiser's Edge Synchronization Options screen, you can specify that *Outlook* records be created from *Raiser's Edge* actions, appeals, and events based on a query.

You can also select to create *Outlook* contact records for *Raiser's Edge* events in a selected query. Doing so enables you to access the Activities tab of the contact record in *Outlook* to see any other record types (appointments, tasks, etc.) associated with the event. You can also specify that *Outlook* items created from actions be deleted if the action is deleted in *The Raiser's Edge*.

▶   **Specifying Calendar and Task synchronization options**

1.   From the *Outlook* toolbar, beside **The Raiser's Edge** button, click **Options**. The Raiser's Edge Synchronization Options screen appears.

2.   Select the Calendar/Tasks tab.
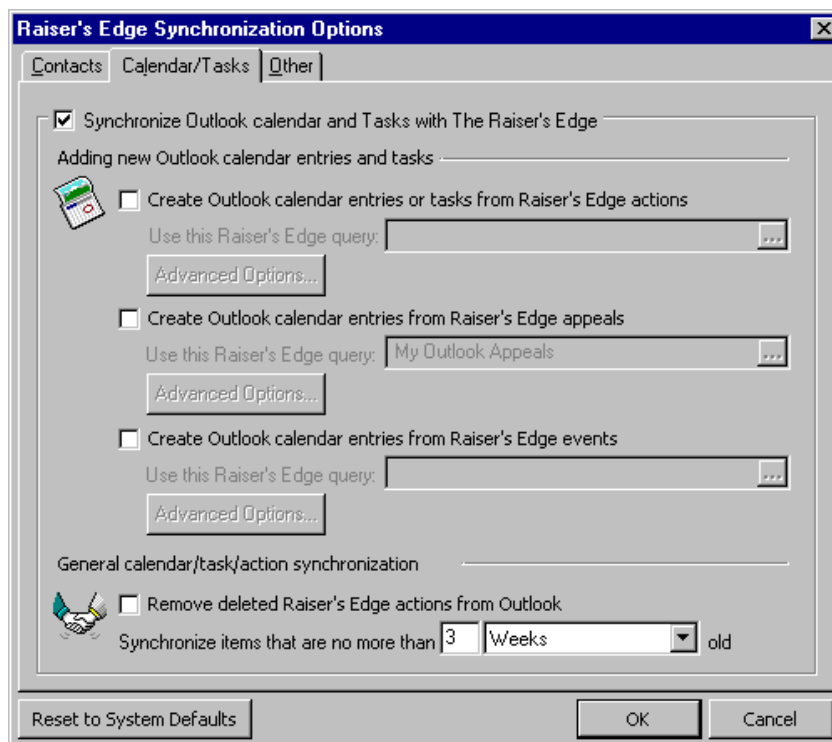
Note: To enable synchronizing actions with *Outlook* tasks and calendar appointments, users must have full *Raiser's Edge* security rights to action records.

3.   To enable synchronizing *Outlook* calendar appointments and tasks with *Raiser's Edge* actions, appeals, and events (if you have the optional module *Event Management*), mark the **Synchronize Outlook calendar and Tasks with The Raiser's Edge** checkbox. If you unmark this checkbox, this feature is not available and all other items on the tab are disabled.

Once records are linked, they remain synchronized even if you later unmark the **Synchronize Outlook calendar and Tasks with The Raiser's Edge** checkbox. The checkbox only controls adding new records to *Outlook* from **The Raiser's Edge** during synchronization. You must break an established link manually. For more information, see "Breaking Links Between Outlook and Raiser's Edge Records" on page 219.

4. Under **Adding new Outlook calendar entries and tasks**, when you mark the **Create Outlook calendar entries or tasks from Raiser's Edge actions** checkbox, actions included in a *Raiser's Edge* query are automatically added as calendar entries or tasks in *Outlook* when you synchronize the programs.

Note: Actions of the category "Meeting" can be added to *Outlook* as calendar appointment entries. "Phone call," "Mailing," "E-mail," and "Task/Other" actions can be added as *Outlook* tasks.

In the **Use this Raiser's Edge query** field, you must specify a query to determine which constituent records are added as contacts. To select or create a query, click the ellipses to access the Open screen for queries.

When you synchronize records, *The Raiser's Edge* runs the query, then looks at the query results and adds any records to *Outlook* that have not already been added. You will probably want to specify a dynamic query. For example, you may want to create a dynamic query containing all actions to which you are assigned. Then, any new actions to which you are assigned will be included in the query and added as calendar entries or tasks in *Outlook* whenever you synchronize the programs.

An entry in the **Use this Raiser's Edge query** field is required when you mark the **Create Outlook calendar entries or tasks for Raiser's Edge actions** checkbox.

5. When you mark the **Create Outlook calendar entries or tasks from Raiser's Edge actions** checkbox, the **Advanced Options** button is enabled.

Click **Advanced Options**. The Advanced Action Options screen appears.
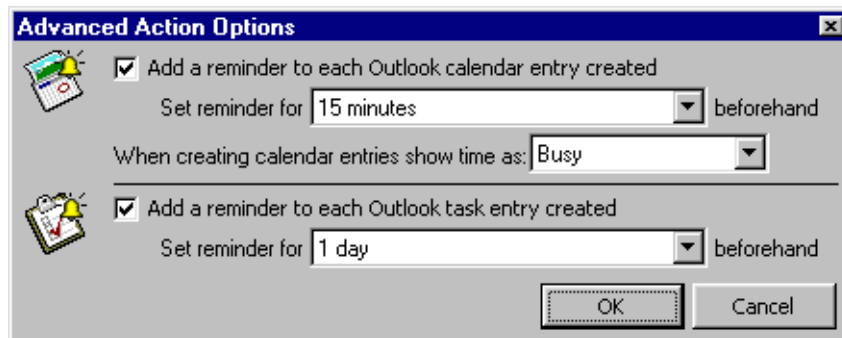
Warning: For calendar appointments and tasks created from actions, reminders are based on settings on the Advanced Action Options screen. They are not affected by **Auto-remind** settings on the action record.

6. When you mark the **Add a reminder to each Outlook calendar entry created** and **Add a reminder to each Outlook task entry created** checkboxes, an *Outlook* reminder is set for each action appointment or task item created from *Raiser's Edge* information. You can mark neither, one, or both of these checkboxes.

For calendar appointments and tasks created from actions, reminders are set based on your entries here. They are not affected by **Auto-remind** settings on *The Raiser's Edge* action record.

Warning: *Outlook* does not allow reminders to be set for times that have already passed. If your settings would result in an invalid reminder, no reminder is set for the appointment item.

7. In the **Set reminder for {} beforehand** field, specify the amount of time prior to an appointment or task to display the reminder. *Outlook* does not allow reminders to be set for times that have already passed. If your settings would result in an invalid reminder, no reminder is set for the task item.

8. In the **When creating calendar entries show time as** field, select how you want the time to appear for calendar appointments created in *Outlook*. This setting specifies the time status of appointments when others view your *Outlook* calendar. Select "Free", "Tentative", "Busy", or "Out of Office".

9. Click **OK**. You return to the Calendar/Tasks Tab of the Raiser's Edge Synchronization Options screen.

10. You can specify that *Outlook* calendar entries be made from appeal records. When you mark the **Create Outlook calendar entries from Raiser's Edge appeals** checkbox, appeals in a selected query in *The Raiser's Edge* are automatically added as calendar entries in *Outlook*.

   In the **Use this Raiser's Edge query** field, specify a query to determine which appeals are added as calendar entries. To select or create a query, click the ellipses to access the Open screen for queries.

   When you synchronize records, *The Raiser's Edge* runs the query, then looks at the query results and adds any records to *Outlook* that have not already been added. You will probably want to specify a dynamic query. For example, you may want all your organization's appeals to appear on your *Outlook* calendar. You can create a dynamic query that contains all your event records. Then, any new events added in *The Raiser's Edge* are included in the query and added as calendar entries in *Outlook* whenever you synchronize the programs.

   An entry in the **Use this Raiser's Edge query** field is required when you mark the **Create Outlook calendar entries from Raiser's Edge appeals** checkbox.

11. When you mark the **Create Outlook calendar entries from Raiser's Edge appeals** checkbox, the **Advanced Options** button is enabled.

   Click **Advanced Options**. The Advanced Appeal Options screen appears.
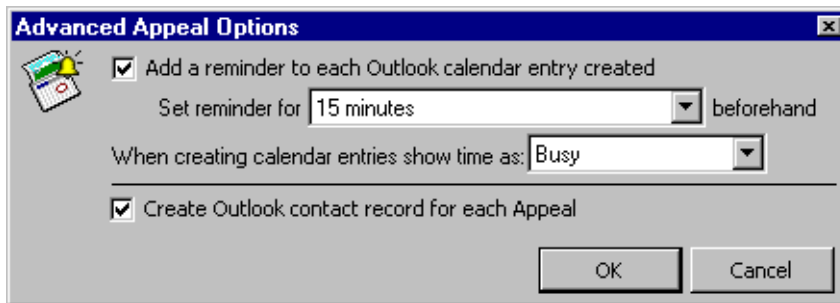
12. When you mark the **Add a reminder to each Outlook calendar entry created** checkbox, an *Outlook* reminder is set for each event calendar appointment item created from *Raiser's Edge* appeal information.

13. In the **Set reminder for {} beforehand** field, specify the amount of time prior to an appointment to display the reminder. *Outlook* does not allow reminders to be set for times that have already passed. If your settings would result in an invalid reminder, no reminder is set for the task item.

14. In the **When creating calendar entries show time as** field, select how you want the time to appear for calendar appointments created in *Outlook*. This setting specifies the time status of appointments when others view your *Outlook* calendar. Select "Free", "Tentative", "Busy", or "Out of Office".

15. When you mark the **Create Outlook contact record for each appeal** checkbox, when you create appointments from appeals, an *Outlook* contact record is also created for the appeal. The appeal contact displays as "| Appeal Name |" to distinguish it from other contacts.
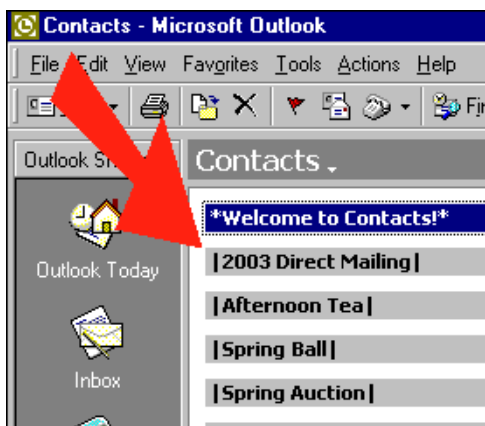
Adding a contact in this manner enables you to access the Activities tab of a contact record in *Outlook* to see all other record types (appointments, tasks, etc.) associated with the contact (which in this case is an appeal rather than a person).

16. Click **OK**. You return to the Calendar/Tasks Tab of the Raiser's Edge Synchronization Options screen.

Note: Events must have at least a start date assigned in *The Raiser's Edge* to create *Outlook* calendar entries from them. Events without a start date will generate a conflict. For more information, see "Synchronization Conflicts" on page 189.

17. If you have the optional module *Event Management*, you can specify that *Outlook* calendar entries be made from event records. When you mark the **Create Outlook calendar entries from Raiser's Edge events** checkbox, events in a selected query in *The Raiser's Edge* are automatically added as calendar entries in *Outlook*.

    In the **Use this Raiser's Edge query** field, specify a query to determine which events are added as calendar entries. To select or create a query, click the ellipses to access the Open screen for queries.

    When you synchronize records, *The Raiser's Edge* runs the query, then looks at the query results and adds any records to *Outlook* that have not already been added. You will probably want to specify a dynamic query. For example, you may want all your organization's events to appear on your *Outlook* calendar. You can create a dynamic query that contains all your event records. Then, any new events added in *The Raiser's Edge* will be included in the query and added as calendar entries in *Outlook* whenever you synchronize the programs.

    An entry in the **Use this Raiser's Edge query** field is required when you mark the **Create Outlook calendar entries for new Raiser's Edge events** checkbox.

18. When you mark the **Create Outlook calendar entries from Raiser's Edge events** checkbox, the **Advanced Options** button is enabled.

    Click **Advanced Options**. The Advanced Action Options screen appears.
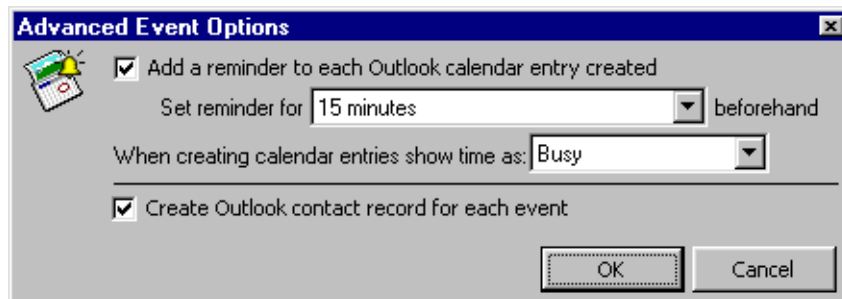
19. When you mark the **Add a reminder to each Outlook calendar entry created** checkbox, an *Outlook* reminder is set for each event calendar appointment item created from *Raiser's Edge* information.

20. In the **Set reminder for {} beforehand** field, specify the amount of time prior to an appointment to display the reminder. *Outlook* does not allow reminders to be set for times that have already passed. If your settings would result in an invalid reminder, no reminder is set for the task item.

21. In the **When creating calendar entries show time as** field, select how you want the time to appear for calendar appointments created in *Outlook*. This setting specifies the time status of appointments when others view your *Outlook* calendar. Select "Free", "Tentative", "Busy", or "Out of Office".

22. When you mark the **Create Outlook contact record for each event** checkbox, when you create appointments from events, an *Outlook* contact record is also created for the event. The event contact displays as "| Event Name |" to distinguish it from other contacts.
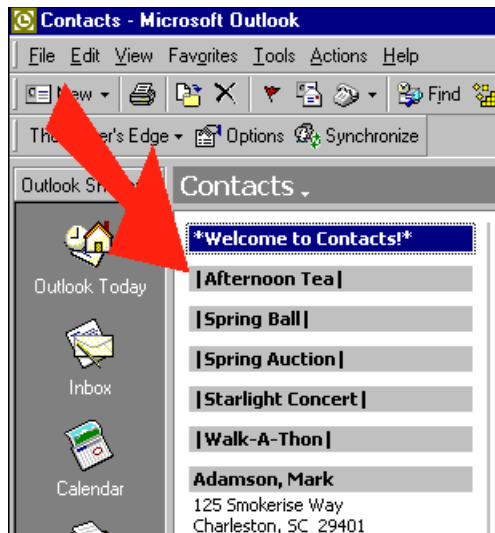
Adding a contact in this manner enables you to access the Activities tab of a contact record in *Outlook* to see all other record types (appointments, tasks, etc.) associated with the contact (which in this case is an event rather than a person).

23. Click **OK**. You return to the Calendar/Tasks Tab of the Raiser's Edge Synchronization Options screen.

Note: Tasks are linked to actions using an import ID. When *The Raiser's Edge* checks whether a task is linked to an action, it does so by checking the task to see if it contains a *Raiser's Edge* import ID.

24. Under **General calendar/task/action synchronization**, when you mark the **Remove deleted Raiser's Edge actions from Outlook** checkbox, if an *Outlook* appointment or task item with a *Raiser's Edge* import ID exists, but no corresponding action or event can be found in *The Raiser's Edge*, the *Outlook* appointment or task is deleted.

Marking this checkbox can never result in records being deleted from *The Raiser's Edge*. You cannot delete an action or event from *The Raiser's Edge* based on changes made in *Outlook*.

25. In the **Synchronize items that are no more than { } old** field, select a time interval to further filter the actions and events used to create calendar appointments and tasks.

The time frame you select here filters the items contained in the action and event queries used to create calendar entries and tasks. Enter a number and select an interval of "Minutes", "Hours", "Days", "Weeks", "Months", or "Years".

For example, your query may specify to create *Outlook* records for all actions to which you are assigned. However, you may want to synchronize only those *Raiser's Edge* actions that are no more than a week old to avoid adding tasks and appointments for actions that are in the past.

26. To save your changes and close the Raiser's Edge Synchronization Options screen, click **OK**. If you want to close the Raiser's Edge Synchronization Options screen without saving any changes, click **Cancel**. To remove any changes you have made during this or any previous session, click **Reset to System Defaults**.

Other Options Tab

On the Other tab of the Raiser's Edge Synchronization Options screen, you can specify whether you want a message to appear each time you open *Outlook*, asking whether you want to synchronize it with *The Raiser's Edge*. You can also specify whether you want to preview changes before records are processed during synchronization.

▶ **Specifying Other synchronization options**

1. From the *Outlook* toolbar, beside **The Raiser's Edge** button, click **Options**.

2. Select the Other tab.
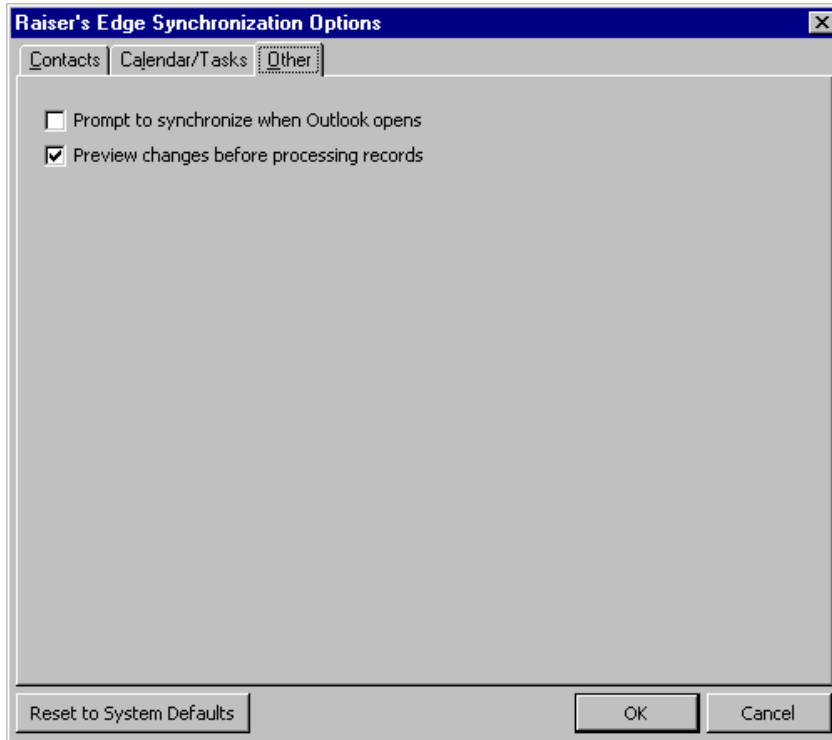
3. When you mark the **Prompt to synchronize when Outlook opens** checkbox, a message appears each time you open *Outlook*, asking if you want to synchronize it with **The Raiser's Edge**.

4. When you mark the **Preview changes before processing records** checkbox, a Review Update screen listing the records that will be added, updated, or deleted appears each time you process records. You must click **OK** on this screen to continue processing.

   From the Review Update screen, you can also remove specific records from the grid so they do not get added, updated, or deleted during the synchronization process. However, if these records are in the source query, or if they are changed after the current synchronization, they may appear in the grid the next time you synchronize the two programs.

5. To save your changes and close the Raiser's Edge Synchronization Options screen, click **OK**. If you want to close the Raiser's Edge Synchronization Options screen without saving any changes, click **Cancel**. To remove any changes you have made during this or any previous session, click **Reset to System Defaults**.

Synchronizing The Raiser's Edge With Outlook

Note: Before you can synchronize the two programs, the Office Collaboration Data Objects (CDO) must be installed. They are available on your Microsoft *Office* CD. If you use *2007*, you must download Collaboration Data Objects, version 1.2.1, from www.microsoft.com. For more information, see "Office Collaboration Data Objects (CDO)" on page 171.

Synchronizing the two programs ensures that linked records in each program are up-to-date. Selections you make on the Raiser's Edge Synchronization Options tabs affect which **Raiser's Edge** records are added and linked in *Outlook*. For more information about these tabs, see "Outlook Synchronization Options" on page 178.

You can synchronize each time you open *Outlook* if you mark the **Prompt to synchronize when Outlook opens** checkbox on the Other tab of the Raiser's Edge Synchronization Options screen.

▶ **Synchronizing The Raiser's Edge with Outlook**

You must be working online to synchronize records. This means you must be logged into the *Raiser's Edge* database. From the *Outlook* toolbar, click **The Raiser's Edge** and make sure **Work Offline** is not checked. If you are not already online, the login screen appears and you must enter your **User name** and **Password**.

> **Tip**: You can also specify to synchronize records every time you open *Outlook*.

1. From the *Outlook* toolbar, click **Synchronize**.

   For *Outlook 2010*, the toolbar appears on the Add-Ins tab of the *Outlook* menu bar.
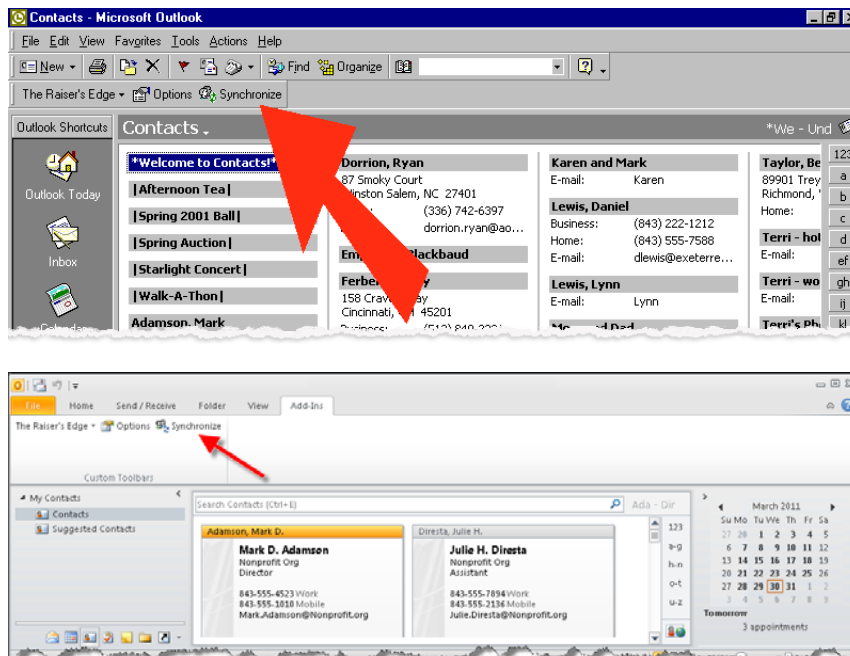
> **Warning**: If any of the queries you selected on the Raiser's Edge Synchronization Options screen tabs has been deleted from **The Raiser's Edge**, a message appears, informing you that a query name is required. When you close the message, the Raiser's Edge Synchronization Options screen appears open to the tab on which the query is required.

   A process screen appears.
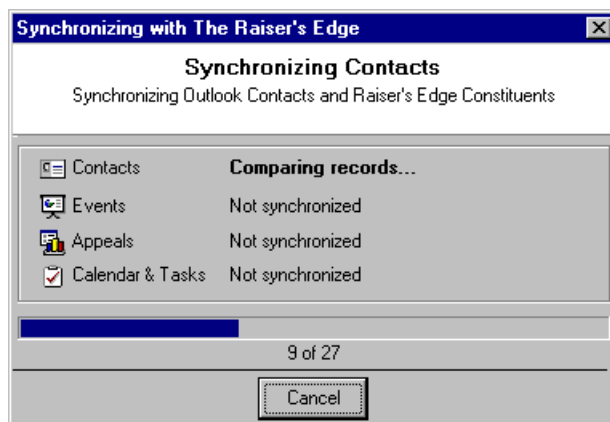
If you selected queries on the Raiser's Edge Synchronization Options screen, *The Raiser's Edge* updates them and compares the results with your *Outlook* records to determine whether anything needs to be updated. Additionally, records that have been linked previously are checked for changes to determine whether the corresponding record in the other program needs to be updated.

2. The Synchronize {type of record} screen appears when records are flagged to be updated and you marked the **Preview changes before processing records** checkbox on the Options/Other tab on the Synchronization Options screens. For example, if contact records are being updated, the Synchronize Contacts screen appears.
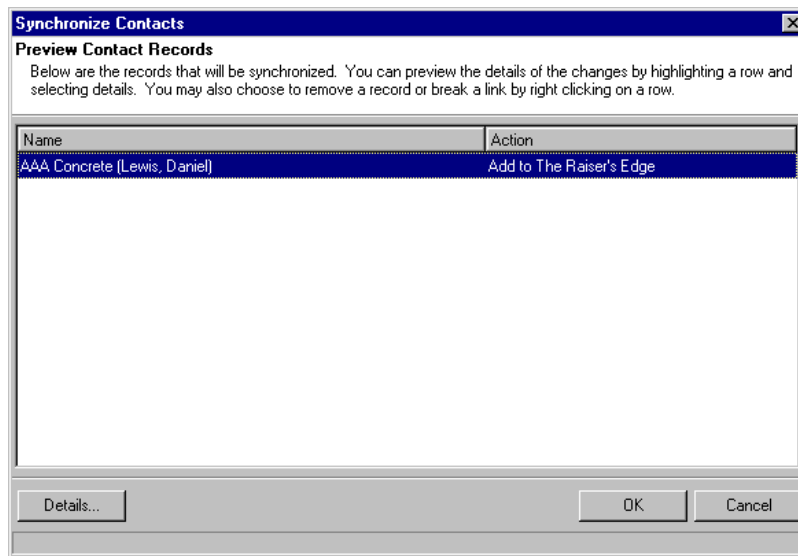
3. To view more detailed information for an item, select it in the grid and click **Details**. The Field Details screen appears. The items on this screen vary based on the *Outlook* record type. The screen lists the information that is being added or updated.

4. To close the Details screen and return to the Synchronize Contacts screen, click **OK**.

Note: If any calendar appointment or task records are flagged to be updated and you marked the **Preview changes before processing records** checkbox on the Options/Other tab on the Synchronization Options screens, the Synchronize Appointments screen and Synchronize Tasks screen also appear.

5. On the Synchronize Contacts screen, the **Name** column lists the **Full Name** from *Outlook* or *The Raiser's Edge*. It lists either the individual name, organization name, or organization name (contact name).

    The **Action** column informs you what will happen to each record during processing. If an action cannot be completed for any reason, a conflict is generated. For more information about conflicts, see "Synchronization Conflicts" on page 189.

    The possible entries in the **Action** column are:

    • **Add to The Raiser's Edge** – adds the record to *The Raiser's Edge* when the **Create Link** option was used while offline. If the record cannot be added (for example, due to the *Outlook* record not containing information for *Raiser's Edge* fields you have made required, or business rules you may have set), a conflict is generated.

    • **Add to Outlook** – adds the record to *Outlook*. If the record cannot be added (for example, due to the record containing information for *Raiser's Edge* fields you have made required, or business rules you may have set) a conflict is generated.

    • **Update The Raiser's Edge** – updates the record in *The Raiser's Edge*. If the record cannot be updated for any reason, a conflict is generated.

    • **Update Outlook** – updates the record in *Outlook*. If the record cannot be updated for any reason, a conflict is generated.

- **Update Records** – Indicates a change in both programs. This always generates a conflict because **The Raiser's Edge** cannot tell which record is the most current.

Warning: There is no delete from **The Raiser's Edge**. You cannot delete **Raiser's Edge** records from *Outlook*.

- **Delete from Outlook** – removes the record from *Outlook*.
- **Edit Link** – appears if a link is somehow broken. For example, this occurs when a record is deleted from **The Raiser's Edge**, but you did not mark the **Remove deleted Raiser's Edge constituents from Outlook contacts** checkbox on the Raiser's Edge Synchronize Options screen Contacts tab.

  Edit Link appears if you change a linked address, or change a last name or an organization name for a **Raiser's Edge** contact. **Edit Link** also appears if you remove the **RE7-Import ID** or change it to an invalid entry under "User-defined fields" on the All Fields tab of an *Outlook* contact record. **The Raiser's Edge** uses an import ID to link a **Raiser's Edge** and an *Outlook* record. We strongly recommend you never change the import ID from the All Fields tab.

6. After you finish reviewing the records that will be added or updated, click **OK**.

   A processing screen appears. If there are errors during the processing, the Conflicts screen appears for the type of record with the errors. Conflicts can be created for a variety of reasons. For more information about conflicts and how to resolve them, see "Synchronization Conflicts" on page 189.

7. To close the Synchronize screen, click **OK**.

Synchronization Conflicts

Note: *Outlook* records that you specified to link to **The Raiser's Edge** while offline are linked during the next synchronization. For more information about working offline, see "Linking Records Offline" on page 215.

During the synchronization process, **The Raiser's Edge** examines linked *Outlook* contacts, tasks, and appointments (including records you have linked while offline), and **The Raiser's Edge** constituents, events, appeals, and actions in your selected queries. After comparing the records, **The Raiser's Edge** does one of three things:

- Adds the record to *Outlook* or **The Raiser's Edge**
- Updates the record in *Outlook* or **The Raiser's Edge**
- Removes the record from *Outlook*

If **The Raiser's Edge** is unable to perform one of these actions, it is because of a conflict. If conflicts are detected, the Conflict screen appears and you must either correct the condition that caused the conflict or break the link between the records. For more information about the Conflict screen, see "Resolving conflicts" on page 190.

Conflicts can be caused when:

- Records have been changed in both **The Raiser's Edge** and *Outlook* since the last synchronization. In this situation, **The Raiser's Edge** cannot determine which record to update.
- A linked record cannot be found in **The Raiser's Edge**.
- A change is made to an *Outlook* record that indicates the link may be broken. For example, changing a last name or an organization name on an organization contact link.
- A linked address is changed.
- A record cannot be saved in **The Raiser's Edge** because fields you specified as required do not contain any information from the *Outlook* record, or business rules you have set otherwise prevent it.
- Adding a record from *Outlook* would create duplicate records in **The Raiser's Edge**. Duplicate records are determined by the criteria you establish in *Configuration*, Business Rules. For more information, see the Configuration chapter of the *Configuration & Security Guide*.
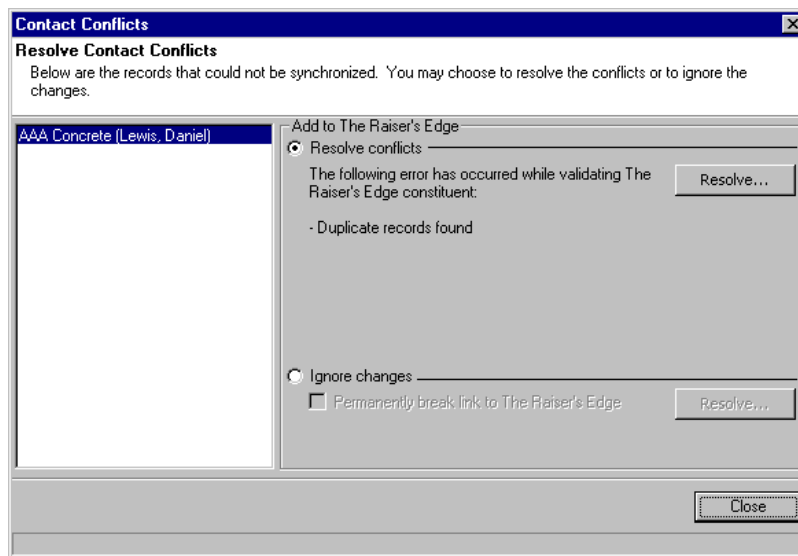
Resolving Conflicts

When conflicts are encountered during synchronization, the Conflict screen appears. You can use the Conflict screen to either correct the problem or break the link to the record.

▶ **Resolving conflicts**

1. From the *Outlook* toolbar, click **Synchronize**. The synchronization process begins. For more information about this process, see "Synchronizing The Raiser's Edge With Outlook" on page 186.

   If *The Raiser's Edge* encounters any conflicts during this process, the Conflicts screen appears for the type of record with the errors. For more information about causes of conflicts, see "Synchronization Conflicts" on page 189.

   The cause of the conflict is listed on the screen. You can mark an option to **Resolve conflicts** or **Ignore changes**.

2. When you mark **Resolve conflicts**, click **Resolve** to go through the steps necessary to resolve the conflict. This may involve using the Linking Wizard for the type of record, such as in the case of "Edit Link" or "Duplicate Records" conflicts or if records were changed in both programs since the last synchronization.

   For more information about the Linking Wizard for each type of *Outlook* record, see:

   • "Contact Linking Wizard" on page 192.

   • "Appointment Linking Wizard" on page 202.

   • "Task Linking Wizard" on page 208.

   Resolving conflicts may also involve editing a *Raiser's Edge* record (constituent, relationship, action, appeal, or event), if additional required information is necessary to save the record. If additional information is needed to save the record, when you click **Resolve**, the *The Raiser's Edge* record appears for you to add the necessary information.

3. When you mark the **Ignore changes** option, you can specify that you do not want to link the records that caused the conflict. When you click **Resolve**, the program does not attempt to link the records during this synchronization so it can complete. However, the next time you synchronize, the program will again attempt to create a link between the records.

4. When you mark the **Permanently break link to The Raiser's Edge** checkbox, when you click **Resolve**, the program does not attempt to link the records. However, if the *Raiser's Edge* records are included as results in a query you selected in Options, the program will attempt to link the records the next time you synchronize. To remove these records from all future synchronizations, you must remove them from the query results.

Contact Records

You can link *Outlook* contact records with three types of **Raiser's Edge** records.

- Individuals.
- Organizations.
- Contact at an Organization. You can manually link an *Outlook* contact to any individual relationship for an organization in **The Raiser's Edge**. During automatic processing, *Outlook* contacts can be linked to individual relationships that are specified as contacts for organizations in **The Raiser's Edge** (by marking the **Contact** checkbox, and optionally specifying the **Contact type**).

Warning: You can synchronize only with contacts in the default Contacts folder in *Outlook*. New contacts added through the integration are also placed in this folder. If you move synchronized contacts out of this folder, the connection with **Raiser's Edge** constituents is broken.

For both individuals and organizations, the **Preferred address** is synchronized. For contact records created from individuals, the preferred address is placed in the **Address** box with a type of "Home" on the General tab of *Outlook*. For contacts created from organizations, the preferred address is placed in the **Address** box with a type of "Business." For *Outlook* contacts created from **Raiser's Edge** organization contacts, the individual relationship address is placed in the **Address** box with a type of "Business."

Phone numbers are pulled from and synchronized with the preferred address (or the individual address).

After a contact record is linked with a **Raiser's Edge** constituent record, you can select the All Fields tab in *Outlook* to view additional **Raiser's Edge** information included on the contact record.

Warning: We strongly recommend you not edit any information on the *Outlook* All Fields tab. Doing so can break links between records.

We strongly recommend you use the All Fields tab for reference purposes only. You should not edit any information on the All Fields tab. Doing so may break links between records or result in synchronization between the wrong records.

Contact Linking Wizard

Using the Contact Linking Wizard, you can link records from *Outlook*. You can work online — meaning while you are connected to **The Raiser's Edge** database — and link and create records while you work. You can also work offline and specify that records in *Outlook* be added to **The Raiser's Edge** the next time you synchronize the programs. For more information about working offline, see "Linking Records Offline" on page 215.

You can link an *Outlook* contact record to an existing **Raiser's Edge** record, create a new constituent record, create a new organization and **Raiser's Edge** contact for that organization, or add a link as a **Raiser's Edge** contact to an existing organization record. Linking *Outlook* contact and **Raiser's Edge** constituent records enables you to make changes to the record in one program and then synchronize to update your changes in the other program.

After you select the type of constituent record you want to create or link with, the Contact Linking Wizard guides you through all the steps necessary to create the link between the two programs.

▶ **Linking Outlook contacts to existing Raiser's Edge constituents**

This procedure examines how to link an *Outlook* contact record to an existing **Raiser's Edge** constituent record. You can link to an existing individual or organization constituent record.

1. From the *Outlook* toolbar, click **The Raiser's Edge**. If you are offline, click **Work Online**.

> **Tip**: From *Outlook*, select **View**, **Current View**, **By Category** to see **The Raiser's Edge** items.

2. Open the *Outlook* contact record you want to link to an existing record in **The Raiser's Edge**.
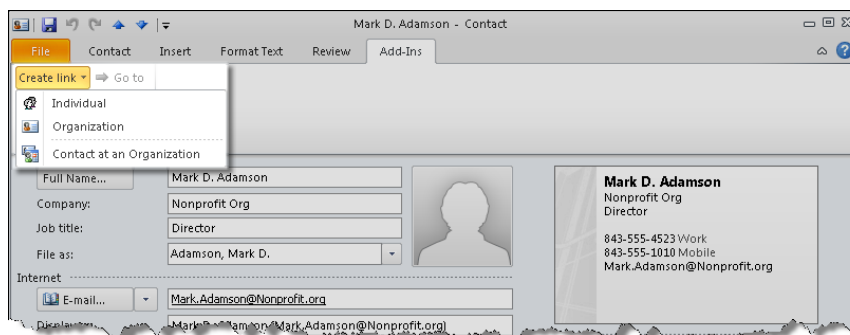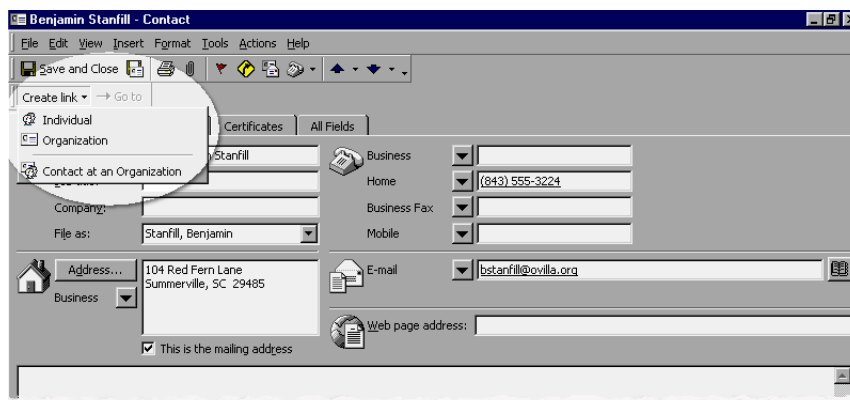
3. From the toolbar, click **Create link**. A drop-down menu appears.

For *Outlook 2010*, the toolbar appears on the Add-Ins tab of the *Outlook* menu bar.

4. Select the *Raiser's Edge* record type you want to link with this contact, **Individual**, **Organization** or **Contact at an organization**. For this procedure, we are linking to an individual record - follow similar steps to link to an organization. You can also link to an organization contact relationship. For more information about linking to an organization contact, see "Linking Outlook contacts as Raiser's Edge organization contacts" on page 198.

Select **Individual**. The Contact Linking Wizard, Link Constituent screen appears.

5. The **Outlook Contact Information** frame on the lower left of the screen displays the information from the contact record. To link this contact to an existing constituent in *The Raiser's Edge*, mark the **Link to constituent** option.

For more information about adding a new constituent, see "Linking Outlook contacts to new Raiser's Edge constituents" on page 195.

6. Click the binoculars to access the Open screen for constituents so you can select the record with which to link the *Outlook* contact record. Select a record and click **Open**. You return to the Contact Linking Wizard, Link Constituent screen.
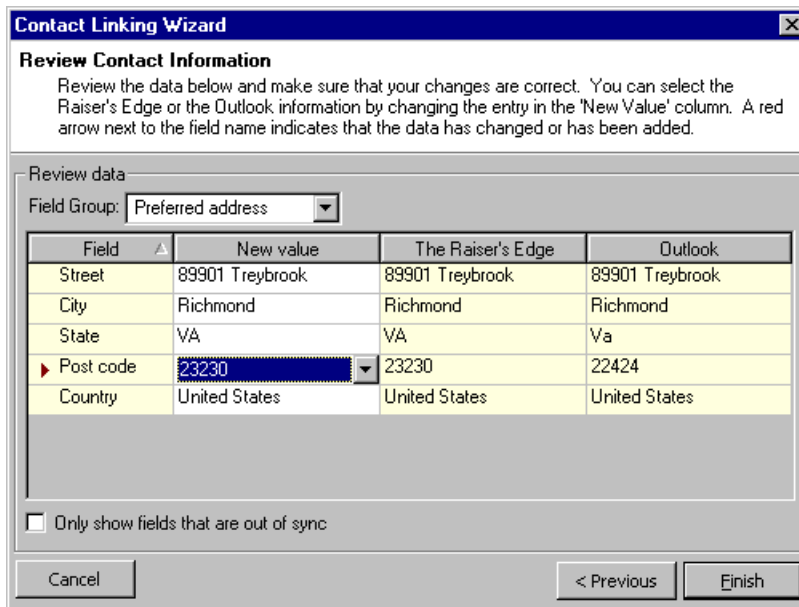
7. The information from the constituent record appears in the **Raiser's Edge Contact Information** frame on the lower right of the screen. Click **Next** to continue. The Contact Linking Wizard, Review Contact Information screen appears.

From this screen, you can preview the information that will be included on the linked records.

8. In the **Field Groups** field, select the area of *The Raiser's Edge* record for which you want to view field value information. For example, to view name information select "Constituent," or to view street number, city, state, country, and ZIP Code information, select "Preferred Address".

The **Raiser's Edge** column displays the value currently in *The Raiser's Edge*. The **Outlook** column contains the current entry on the contact record.

9. Entries appear in the **New value** column only when the information in the **Raiser's Edge** and **Outlook** columns is not the same. The entry defaults to the information in *The Raiser's Edge*. From the **New value** dropdown, you can select the current entry from either program, or no entry so the fields will be blank on the records. Select the information that you want to appear in both the constituent and contact records.

10. Fields that are being updated or created — those which contain an entry in the **New value** column and do not have the same identical entry in the **Raiser's Edge** and **Outlook** columns — are not yet synchronized. To make verifying the information that is being changed or added easier, you can view only these fields. To do so, mark the **Only show fields that are out of sync** checkbox.

    For information about which fields are mapped from *Outlook* to *The Raiser's Edge*, see "Outlook Contact Field Mappings" on page 220.

11. To create the link between the records, click **Finish**. If a required field on the constituent record does not contain information, the constituent record screen appears and you must enter data in the required field before you can save the record.

    When you open the contact record in *Outlook*, the record now contains a **Categories** field entry of "Raiser's Edge Contact."

Tip: When an *Outlook* record is linked to a *Raiser's Edge* record, you can click **Go to** on the *Outlook* toolbar to access *The Raiser's Edge* record directly from the *Outlook* record.

    You now have the option of accessing the *Raiser's Edge* constituent record directly from the *Outlook* contact record by clicking **Go to** on the toolbar.

▶ **Linking Outlook contacts to new Raiser's Edge constituents**

This procedure examines how to create a new individual constituent record from an *Outlook* contact record. You can follow similar steps to create an organization record.

1. From the *Outlook* toolbar, click **The Raiser's Edge**. If you are offline, click **Work Online**.
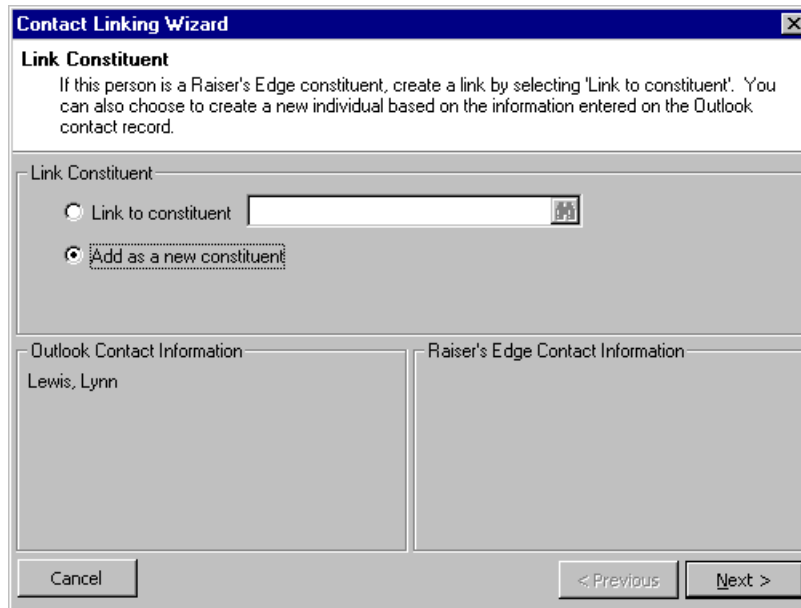
2. Open the *Outlook* contact record for which you want to create a linked record in **The Raiser's Edge**.
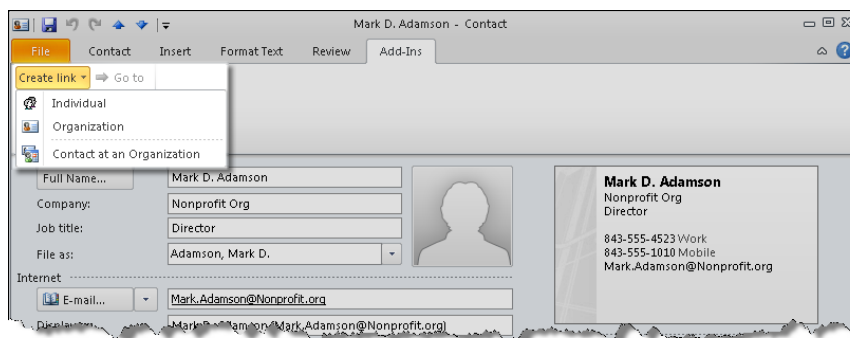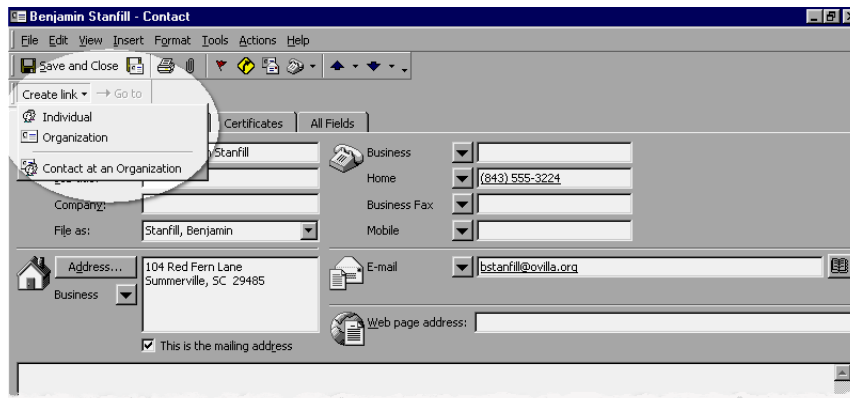
3. From the toolbar, click **Create link**. A drop-down menu appears.

   For *Outlook 2010*, the toolbar appears on the Add-Ins tab of the *Outlook* menu bar.

4. Select the **Raiser's Edge** record type you want to link with this contact: **Individual**, **Organization** or **Organization contact**.

   For this procedure, we are linking to an individual record - you can follow similar steps to link to an organization. You can also link to an organization contact relationship. For more information about linking to an organization contact, see "Linking Outlook contacts as Raiser's Edge organization contacts" on page 198.

For this procedure, select **Individual**. The Contact Linking Wizard, Link Constituent screen appears.

5. For this procedure, we are creating a new constituent record in *The Raiser's Edge* based on the information in the *Outlook* contact record. Mark the **Add as a new constituent** option and click **Next**. The Contact Linking Wizard, Review Contact Information screen appears.

From this screen, you can preview information that will be included on the constituent record you are creating. *The Raiser's Edge* attempts to determine the data you want to use for the new record based on the information contained in the *Outlook* contact record.

6. In the **Field Group** field, select the area of *The Raiser's Edge* record for which you want to view field value information. For example, you can select "All Fields" to view all information or "Preferred Address" to view only street number, city, state, country, and ZIP Code information.

The **New value** column displays information that will be included on the new *Raiser's Edge* record. When updating or linking to an existing record, the **Raiser's Edge** column displays the value currently in *The Raiser's Edge*. The **Outlook** column contains the current entry on the contact record.

7. Fields that are being updated or created — those which contain an entry in the **New value** column and do not have the same entry in the **Raiser's Edge** and **Outlook** columns — are not yet synchronized. To make verifying the information that is being changed or added easier, you can view only these fields in the grid. To do so, mark the **Only show fields that are out of sync** checkbox.

    For information about which fields are mapped from *Outlook* to *The Raiser's Edge*, see "Outlook Contact Field Mappings" on page 220.

8. To create the constituent record, click **Finish**. If a required field on the constituent record does not contain information, the constituent record screen appears and you must enter data in the required field before you can save the record.

    When you open the contact record in *Outlook*, the record now contains a **Categories** field entry of "Raiser's Edge Contact."

> **Tip**: When an *Outlook* record is linked to a *Raiser's Edge* record, you can click **Go to** on the *Outlook* toolbar to access *The Raiser's Edge* record directly from the *Outlook* record.

You now have the option of accessing the *Raiser's Edge* constituent record directly from the *Outlook* contact record by clicking **Go to** on the toolbar.

▶ **Linking Outlook contacts as Raiser's Edge organization contacts**

This procedure examines how to create a relationship contact for an organization constituent record in *The Raiser's Edge* from a contact record in *Outlook*.

1. From the *Outlook* toolbar, click **The Raiser's Edge**. If you are offline, click **Work Online**.

2. Open the *Outlook* contact record you want to create an organization contact relationship for in *The Raiser's Edge*.
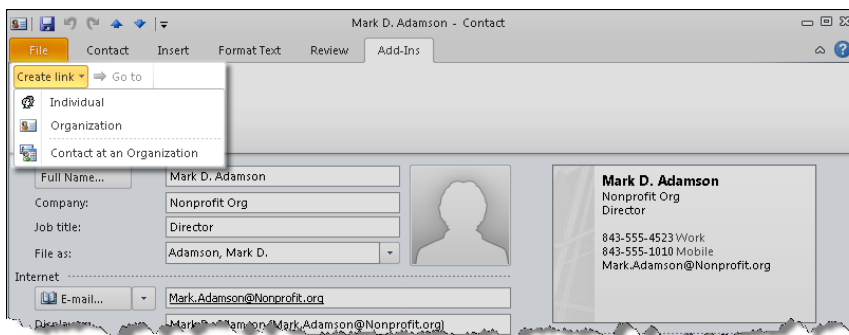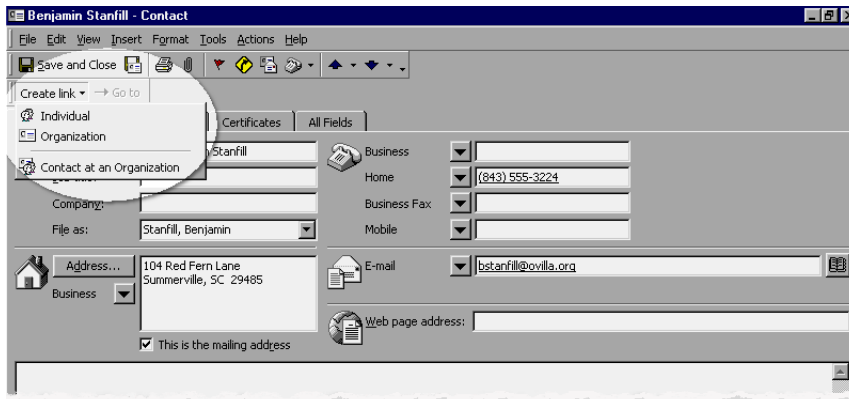
3. From the toolbar, click **Create link**. A drop-down menu appears.

   For *Outlook 2010*, the toolbar appears on the Add-Ins tab of the *Outlook* menu bar.

4. Select the *Raiser's Edge* record type you want to link with this contact: **Individual**, **Organization** or **Contact at an organization**.

   For this procedure, we will select **Contact at an organization**. The Contact Linking Wizard, Link Constituent screen appears.

5. The **Outlook Contact Information** appears in the lower left frame. Two options are available for linking the contact to a constituent record in *The Raiser's Edge*.

   • **Link to constituent** - If the entry in the **Company** field on this contact record is already an organization constituent in *The Raiser's Edge*, and you want to add this *Outlook* contact as a *Raiser's Edge* contact relationship for that organization, mark the **Link to constituent** option. Click the binoculars to access the Open screen for organization constituents.

   If the company information in the *Outlook* contact record matches the information for the organization in *The Raiser's Edge*, the organization appears highlighted in the search results grid on the Open screen. Click **Open** and you return to the Contact Linking Wizard, Link Constituent screen and the organization name appears in the **Link to constituent** field.

   • **Add as new constituent** - If you want to create a new constituent record for the organization that appears on the *Outlook* contact record **Company** field, mark the **Add as new constituent** option. If no entry appears in the Company field, when you finish the wizard, the New Organization screen appears so you can name the organization constituent.

6. To continue, click **Next**. The Contact Linking Wizard, Link Organization Contact screen appears.

7. You can select an option to:

- **Link to an existing relation record -** (this option is not enabled if you selected the **Add as a new constituent** option on the first wizard screen). If the *Outlook* contact is already an organization contact in *The Raiser's Edge*, mark this option. When you mark this option, click the binoculars to access the Search Relationships screen for the organization.

  Select a relationship and click **Open**. You return to the Contact Linking Wizard, Link Organization Contact screen and the selected relationship appears in the **Link to an existing relationship** field.

- **Link to constituent** - If the *Outlook* contact is already a constituent in *The Raiser's Edge*, mark this option. When you mark this option, the Open screen for constituents appears. If the *Outlook* contact information matches a constituent in your database, that constituent is highlighted in the search grid.

  To return to the Contact Linking Wizard, Link Organization Contact screen, click **Open**. The selected individual constituent record appears in the **Link to constituent** field. The information in the *Outlook* contact record and the entry in this field must match exactly before you can continue. For example, if the *Outlook* contact name is Daniel Lewis, and you select a *Raiser's Edge* constituent of John Lewis, although the name John Lewis appears in the **Link to constituent** field, the **Next** button is not enabled and you cannot continue.

- **Add as a new relation record** - When you mark this option, you are specifying that you want to add the name in the *Outlook* contact record as a new relationship record for the organization in *The Raiser's Edge*.

8. To continue, click **Next**. The Contact Linking Wizard, Review Contact Information screen appears.

This screen enables you to preview the information that will be included on the *Raiser's Edge* organization contact record you are creating.

9. In the **Field Group** field, select the area of *The Raiser's Edge* record for which you want to view field value information. For example, to view all information select "All Fields", or to view only street number, city, state, country, and ZIP Code information, select "Preferred Address".

   The **New value** column displays information that will be included on the new *Raiser's Edge* record. When updating or linking to an existing record, if the information is different in the two programs (as displayed in the **Raiser's Edge** and **Outlook** columns), the **New value** column displays the value currently in *The Raiser's Edge*. You can select the entry from either program, or no entry at all for the field from the **New value** drop-down.

Note: If you are adding a contact record and creating a new organization, and no entry is present in the **Company** field on the *Outlook* contact record, when you click **Finish**, the New Organization screen will appear so you can enter the name of the new organization.

10. Fields that are being updated or created — those which contain an entry in the **New value** column and do not have the same entry in the **Raiser's Edge** and **Outlook** columns — are not yet synchronized. To view only these fields in the grid to make verifying the information that is being changed or added easier, mark the **Only show fields that are out of sync** checkbox.

    For information about which fields are mapped from *Outlook* to *The Raiser's Edge*, see "Outlook Contact Field Mappings" on page 220.

11. Click **Finish**. The contact record is created in the database. If a required field on the constituent record does not contain information, the constituent record screen appears and you must enter data in the required field before you can save the record.

    When you open the contact record in *Outlook*, the record now contains a **Categories** field entry of "Raiser's Edge Contact."

Tip: When an *Outlook* record is linked to a *Raiser's Edge* record, you can click **Go to** on the *Outlook* toolbar to access *The Raiser's Edge* record directly from the *Outlook* record.

You now have the option of accessing the ***Raiser's Edge*** constituent record directly from the *Outlook* contact record by clicking **Go to** on the toolbar.

Appointment Records

Three ***Raiser's Edge*** record types are involved during the synchronization process with *Outlook* appointment records.

- Actions - These are actions with a category of **Meeting** in ***The Raiser's Edge***. Other action categories are handled as *Outlook* **Tasks**. For more information, see "Task Records" on page 208. You must have full ***Raiser's Edge*** security rights to actions before you can synchronize them with *Outlook* records.

- Appeals - All appeal records in ***The Raiser's Edge***.

- Events - (available if you have the optional module *Event Management*) All event records in ***The Raiser's Edge***, except those with a category of "class." Events of the category "class" are not supported in the integration.

Appointment Linking Wizard

Using the Linking Wizard, you can link appointment records to existing or new ***Raiser's Edge*** actions, appeals, and events from *Outlook*. You can work online — meaning while you are connected to ***The Raiser's Edge*** database — and link and create records while you work. You can also work offline and specify that records you add in *Outlook* be updated in ***The Raiser's Edge*** the next time you synchronize the programs. For more information about working offline, see "Linking Records Offline" on page 215.

When you are logged into ***The Raiser's Edge*** database, you can link *Outlook* appointment records to existing actions, appeals, or events (if you have the optional module *Event Management*), or add and link new events, actions, or appeals based on the information in the appointment record.

After you select the type of existing or new record you want to link with, the Appointment Linking Wizard guides you through all the steps necessary to create the link between the two programs.

▶ **Linking Outlook appointments to existing Raiser's Edge actions, appeals, or events**

This procedure examines how to link an *Outlook* appointment record to an existing ***Raiser's Edge*** action record. You can follow similar steps to link to an existing appeal or event (if you have the optional module *Event Management*). When you link appointments to ***Raiser's Edge*** records, you can open the ***Raiser's Edge*** records directly from *Outlook*.

1. From the *Outlook* toolbar, click **The Raiser's Edge**. If you are offline, click **Work Online**.

2. Open the *Outlook* appointment record you want to link with a record in ***The Raiser's Edge***.
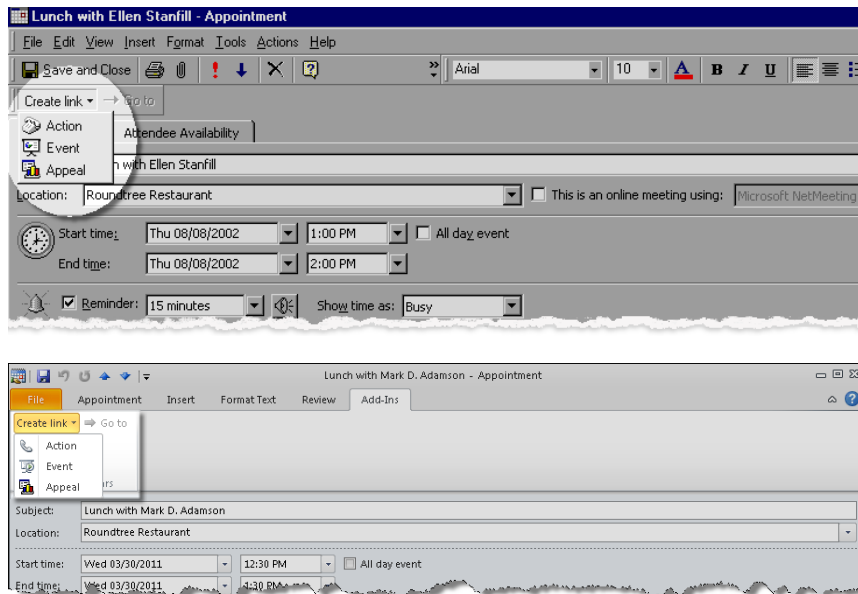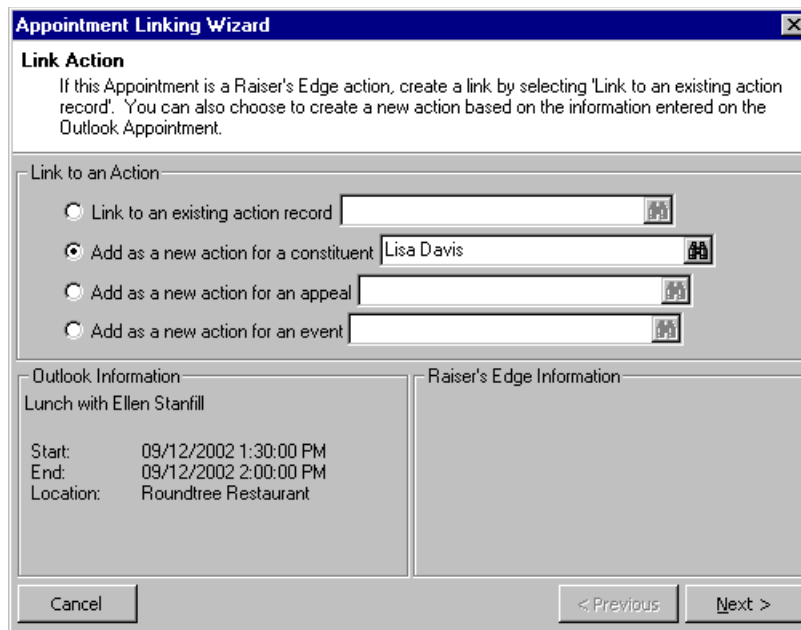

3. From the toolbar, click **Create link**. A drop-down menu appears.

    For *Outlook 2010*, the toolbar appears on the Add-Ins tab of the *Outlook* menu bar.

4. Select ***The Raiser's Edge*** record type you want to link with this appointment: **Action**, **Event**, or **Appeal**. For this procedure, we are linking to an action record - you can follow similar steps to link to an appeal or event.

    Select **Action**. The Appointment Linking Wizard, Link Action screen appears.
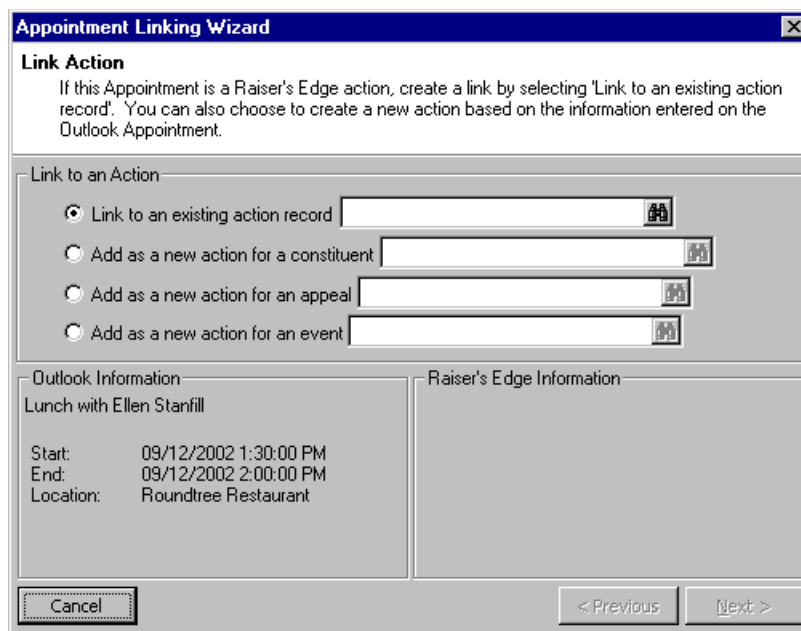
The **Outlook Information** frame on the lower left of the screen displays the information from the appointment record.

5. To link this appointment to an existing action in ***The Raiser's Edge***, mark the **Link to an existing action record** option.

For more information about adding a new action, appeal, or event, see "Linking Outlook appointments to new Raiser's Edge actions, appeals, or events" on page 205.

6. Click the binoculars to access the Open screen for actions so you can select the record with which to link the *Outlook* appointment. Select a record and click **Open**. You return to the Appointment Linking Wizard, Link Action screen.

The information from the action record appears in the **Raiser's Edge Information** frame on the lower right of the screen.

7. Click **Next**. The Appointment Linking Wizard, Review Information screen appears.

From this screen, you can preview the information that will be included on the linked records.

8. In the **Field Group** field, the entry defaults to "Meeting." All meeting fields are listed in the grid.

The **Raiser's Edge** column displays the value currently in *The Raiser's Edge*. The **Outlook** column contains the current entry on the appointment record.

Note: The **Subject** consists of the constituent name followed by the type of action or event name. When adding a new action, the information from the *Outlook* **Subject** field becomes the first line the **Notes** box on *The Raiser's Edge* action record. For more information about how information is mapped between the programs, see "Outlook Appointment Field Mappings" on page 221.

9. Entries appear in the **New value** column only when the information in the **Raiser's Edge** and **Outlook** columns is not the same. The entry defaults to the information in *The Raiser's Edge*. From the **New value** drop-down, you can select the current entry from either program, or no entry so the fields will be blank on the records. Select the entry you want to appear in both the action and appointment records.

10. Fields that are being updated or created — those which contain an entry in the **New value** column and do not have the same identical entry in the **Raiser's Edge** and **Outlook** columns — are not yet synchronized. To make verifying the information that is being changed or added easier, you can view only these fields in the grid. To do so, mark the **Only show fields that are out of sync** checkbox.

    For information about which fields are mapped from *Outlook* to *The Raiser's Edge*, see "Outlook Appointment Field Mappings" on page 221.

11. To create the link between the records, click **Finish**. If a required field on the action record does not contain information, the action record screen appears.

    You must enter data in the required field before you can save the record.

Tip: When an *Outlook* record is linked to a **Raiser's Edge** record, you can click **Go to** on the *Outlook* toolbar to access *The Raiser's Edg*e record directly from the *Outlook* record.

12. When you open the appointment record in *Outlook*, the record now contains a **Categories** field entry of "Raiser's Edge Appointment" and the contact record (the constituent with whom the action is linked in *The Raiser's Edge*) appears in the **Contacts** field.

    You now have the option of accessing the **Raiser's Edge** action record directly from the *Outlook* appointment record by clicking **Go to** on the toolbar.

▶ **Linking Outlook appointments to new Raiser's Edge actions, appeals, or events**

    This procedure examines how to create a new action record from an *Outlook* appointment record. You would follow similar steps to link to create a new appeal or event (if you have the optional module *Event Management*).

    1. From the *Outlook* toolbar, click **The Raiser's Edge**. If you are offline, click **Work Online**.

2. Open the *Outlook* appointment record for which you want to create a linked record in *The Raiser's Edge*.
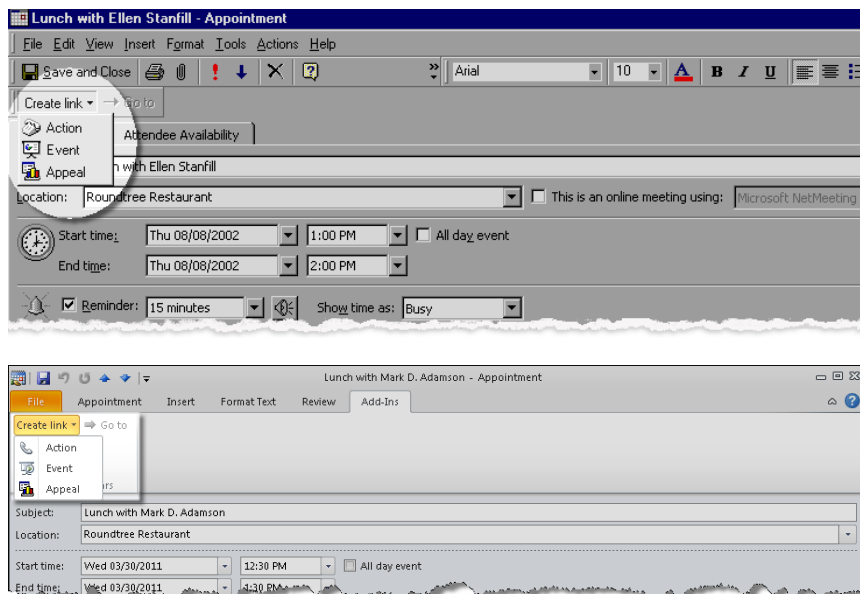
3. From the toolbar, click **Create link**. A drop-down menu appears.

    For *Outlook 2010*, the toolbar appears on the Add-Ins tab of the *Outlook* menu bar.

4. Select the *Raiser's Edge* record type you want to link with this appointment: **Action**, **Event**, or **Appeal**.

    For this procedure, we will link to a new action record - you can follow similar steps to link to a new event.

    Select **Action**. The Appointment Linking Wizard, Link Action screen appears.
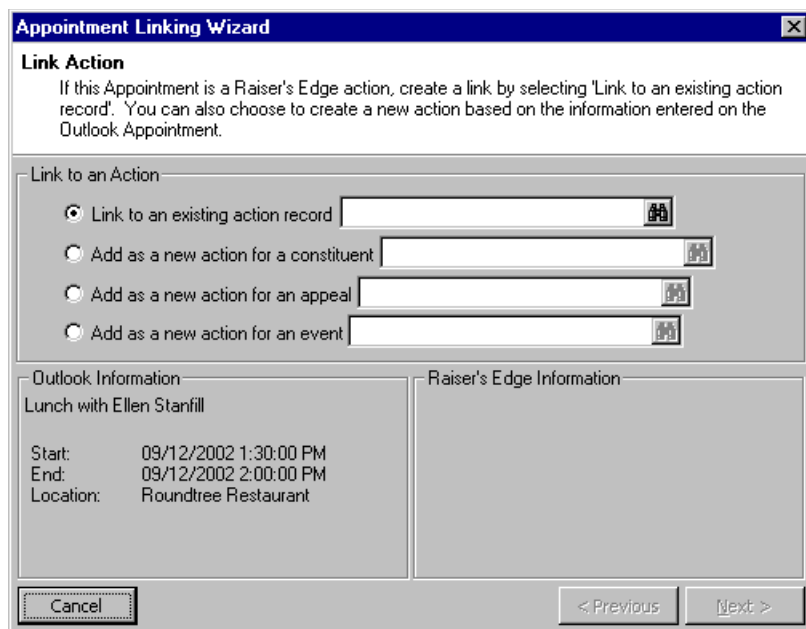
5. The **Outlook Information** frame on the lower left of the screen displays the information from the appointment record. You can link the appointment to a new constituent, appeal, or event action in *The Raiser's Edge*. For this procedure mark the **Add as a new action for a constituent** option.

    For more information about linking to an existing action, appeal, or event, see "Linking Outlook appointments to existing Raiser's Edge actions, appeals, or events" on page 202.

6. Click the binoculars in the **Add as a new action for a constituent** field. The open screen appears so you can select the constituent with which to associate the new action. After you select a constituent, you return to the Link Action screen.

The selected constituent appears in the **Add as a new action for a constituent** field.

7. Click **Next**. The Appointment Linking Wizard, Review Information screen appears.

8. This screen enables you to preview the information that will be included on the action record you are creating. *The Raiser's Edge* attempts to determine the data you want to use for the new record based on the information contained in the *Outlook* appointment record.

Note: When adding a new action, the information from the *Outlook* **Subject** field becomes the first line the **Notes** box on *The Raiser's Edge* action record. For more information about how information is mapped between the programs, see "Outlook Appointment Field Mappings" on page 221.

In the **Field Group** field, the entry defaults to "Meeting." All meeting fields are listed in the grid.

The **New value** column displays information that will be included on the new *Raiser's Edge* record. When updating or linking to an existing record, the **Raiser's Edge** column displays the value currently in *The Raiser's Edge*. The **Outlook** column contains the current entry on the appointment record.

9. Fields that are being updated or created — those which contain an entry in the **New value** column and do not have the same entry in the **Raiser's Edge** and **Outlook** columns — are not yet synchronized. To make verifying the information that is being changed or added easier, you can view only these fields in the grid. To do so, mark the **Only show fields that are out of sync** checkbox.

   For information about which fields are mapped from *Outlook* to *The Raiser's Edge*, see "Outlook Appointment Field Mappings" on page 221.

10. To create the action record in the database, click **Finish**. If a required field on the action record does not contain information, the action record screen appears.

Tip: When an *Outlook* record is linked to a *Raiser's Edge* record, you can click **Go to** on the *Outlook* toolbar to access *The Raiser's Edg*e record directly from the *Outlook* record.

11. When you open the appointment record in *Outlook*, the record now contains a **Categories** field entry of "Raiser's Edge Appointment" and the contact record (the constituent with whom the action is linked in *The Raiser's Edge*) appears in the **Contacts** field.
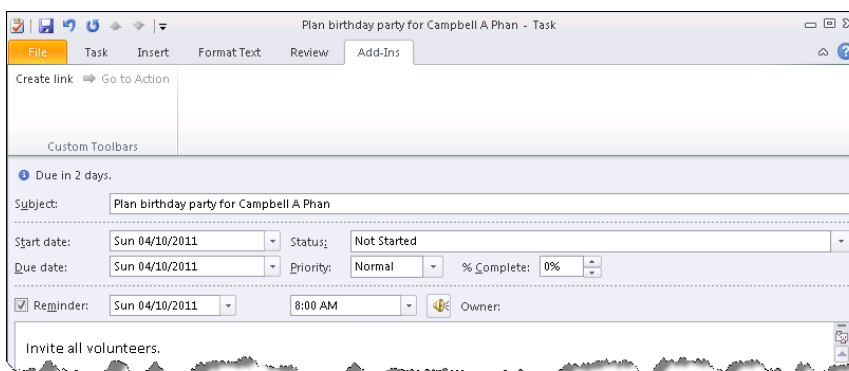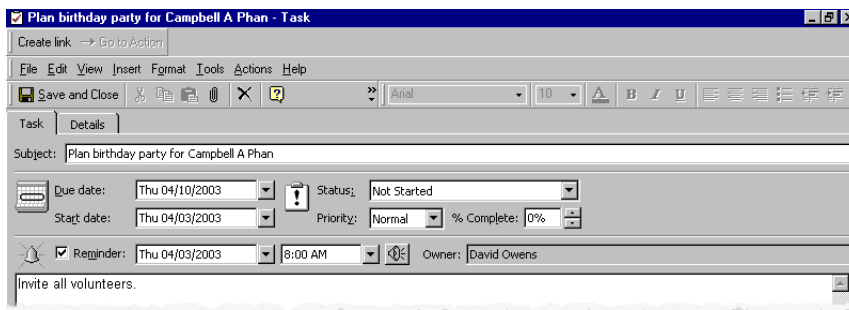

   You now have the option of accessing the *Raiser's Edge* action record directly from the *Outlook* appointment record by clicking **Go to** on the toolbar.

Task Records

Outlook tasks can be linked to *Raiser's Edge* actions with any category other than **Meeting**. Meetings are linked as *Outlook* appointments. You must have full *Raiser's Edge* security rights to actions before you can synchronize them with *Outlook* records.

Task Linking Wizard

Using the Linking Wizard, you can link task records to existing or new *Raiser's Edge* actions from *Outlook*. You can work online — meaning while you are connected to *The Raiser's Edge* database — and link and create records while you work. You can also work offline and specify that records you add in *Outlook* be updated in *The Raiser's Edge* the next time you synchronize the programs. For more information about working offline, see "Linking Records Offline" on page 215.

A *Raiser's Edge* contact must be added to the task before you can link it to a *Raiser's Edge* action record. You can add this contact manually on the task record or you can add it through the Task Linking Wizard.

You can link task records to a constituent and appeal actions or, if you have the optional module *Event Management*, event action records. After you select the type of record you want to link with, the Linking Wizard guides you through all the steps necessary to create the link between the two programs.

You can link an *Outlook* task record to an existing *Raiser's Edge* record or create a new record and link with it.

‣   **Linking Outlook tasks with existing Raiser's Edge actions**

1. From the *Outlook* toolbar, click **The Raiser's Edge**. If you are offline, click **Work Online**.

2. Open the *Outlook* task record you want to link with a record in **The Raiser's Edge**.
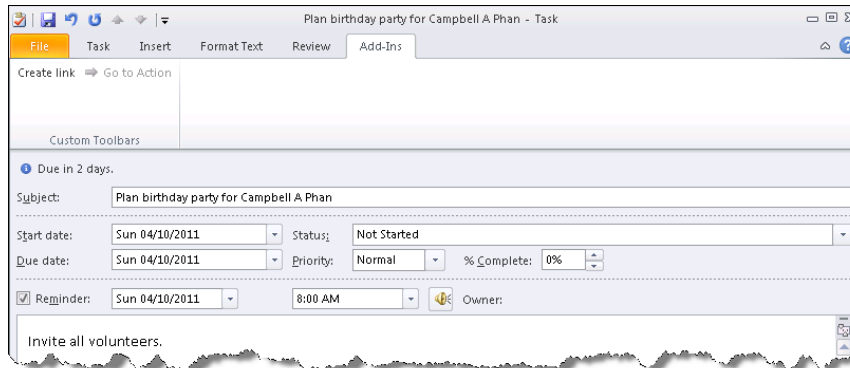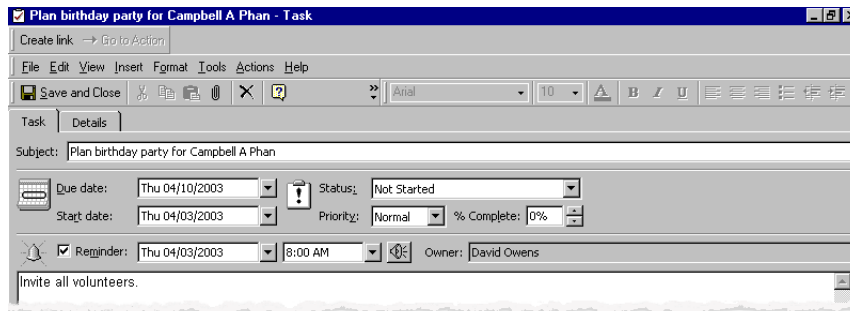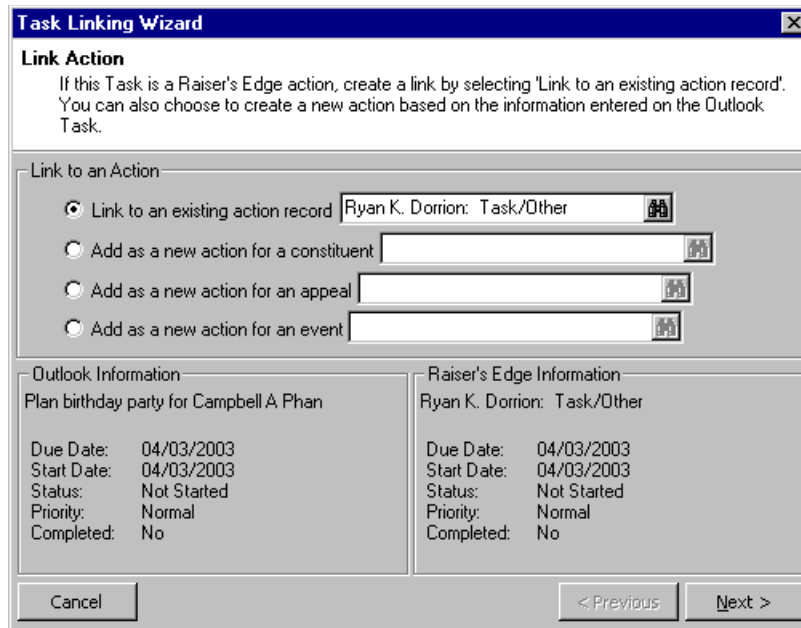
3. From the toolbar, click **Create Link**. The Task Linking Wizard - Link Action screen appears.

For *Outlook 2010*, the toolbar appears on the Add-Ins tab of the *Outlook* menu bar.
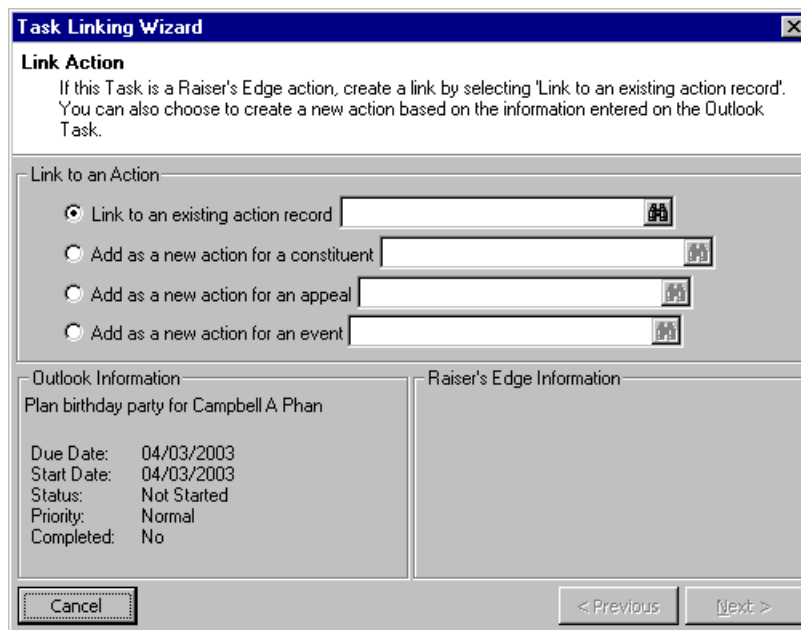
4. The information from the *Outlook* task record appears in the lower left frame. To link this task to an existing action in **The Raiser's Edge**, mark the **Link to an existing action record** option.

For more information about adding and linking to a new action for a constituent or event, see "Linking Outlook tasks with new Raiser's Edge actions" on page 211.

5. Click the binoculars to access the Open screen for actions. From this screen you can select an existing action for a constituent or event. After you select an action and return to the Task Linking Wizard, the selected action appears in the Link field.

The information from the selected action record now appears in the lower right frame of the wizard screen.

6. To continue, click **Next**. The **Review Information** screen appears.

This screen enables you to preview the information that will be included on the linked records.

7. In the **Field Group** field, the entry defaults to "Task" and displays all the fields mapped between tasks and actions. For more detailed information about these mappings, see "Outlook Task Field Mappings" on page 223.

The **New value** column displays information that will be included on the new *Raiser's Edge* record. When updating or linking to an existing record, the **Raiser's Edge** column displays the value currently in *The Raiser's Edge*. The *Outlook* column contains the current entry on the task record.

8. Fields that are being updated or created — those which contain an entry in the **New value** column and do not have the same entry in the **Raiser's Edge** and **Outlook** columns — are not yet synchronized. If you want to view only these fields to make verifying the information that is being changed or added easier, mark the **Only show fields that are out of sync** checkbox.

9. To link to the action record, click **Finish**. When you open the task record in *Outlook*, the record now contains a **Categories** field entry of "Raiser's Edge Task" and the contact record (the constituent with whom the action is linked in *The Raiser's Edge*) appears in the **Contacts** field.

You now have the option of accessing the *Raiser's Edge* action record directly from the *Outlook* task record by clicking **Go to** on the toolbar.

‣ **Linking Outlook tasks with new Raiser's Edge actions**

For this procedure, we are linking an *Outlook* task with a new action for a constituent. If you have the optional module, *Event Management*, you can follow similar steps to link to a new action for an event.

1. From the *Outlook* toolbar, click **The Raiser's Edge**. If you are offline, click **Work Online**.

2. Open the *Outlook* task record for which you want to create a linked record in *The Raiser's Edge*.

3. From the toolbar, click **Create Link**. The Task Linking Wizard - Link Action screen appears.

For *Outlook 2010*, the toolbar appears on the Add-Ins tab of the *Outlook* menu bar.

4. The information from the *Outlook* task record appears in the lower left frame of the screen. To link this task to a new constituent action in ***The Raiser's Edge***, mark the **Add as a new action for a constituent** option.

   For more information about adding an existing action for a constituent, appeal, or event, see "Linking Outlook tasks with existing Raiser's Edge actions" on page 208.

5. Click the binoculars to access the Open screen for constituents. From this screen you can select a constituent for whom you want to create the new action. After you select a constituent and return to the Task Linking Wizard, the selected constituent appears in the Link field.

6. To continue, click **Next**. The **Review Information** screen appears.

This screen enables you to preview the information that will be included on the linked records.

7. In the **Field Group** field, the entry defaults to "Task" and displays all the fields mapped between tasks and actions. For more detailed information about these mappings, see "Outlook Task Field Mappings" on page 223.

The **New value** column displays information that will be included on the new *Raiser's Edge* record. When updating or linking to an existing record, the **Raiser's Edge** column displays the value currently in *The Raiser's Edge*. The *Outlook* column contains the current entry on the contact record.

8. Fields that are being updated or created — those which contain an entry in the **New value** column and do not have the same entry in the **Raiser's Edge** and **Outlook** columns — are not yet synchronized. If you want to view only these fields to make verifying the information that is being changed or added easier, mark the **Only show fields that are out of sync** checkbox.

9. To create the action record, click **Finish**. When you open the task record in *Outlook*, the record now contains a **Categories** field entry of "Raiser's Edge Task" and the contact record (the constituent with whom the action is linked in *The Raiser's Edge*) appears in the **Contacts** field.

You now have the option of accessing the *Raiser's Edge* action record directly from the *Outlook* task record by clicking **Go to** on the toolbar.

Adding Incoming Emails as Actions

You can create **Raiser's Edge** actions from incoming emails with the click of a button. When you integrate **The Raiser's Edge** with *Outlook*, a **Create Action** button becomes available on the toolbar of incoming emails.
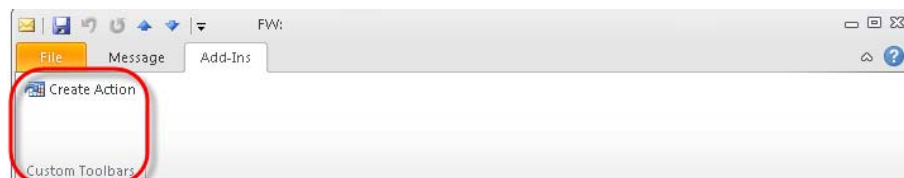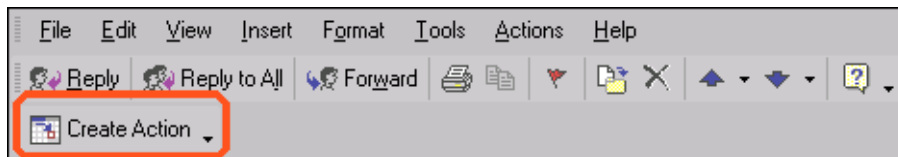
When you click the button, an action is created based on the email. You can set business rules to determine such things as a default action type and action notepad type for actions created from incoming emails. Additionally, you can specify not to save attachments over a certain size. The emails are actually embedded in the action and stored in your **Raiser's Edge** database. For that reason, you may want to limit the size of attachments you allow to be saved. For more information about these business rules, see the Configuration chapter of the *Configuration & Security Guide*.

When you specify to create an action, **The Raiser's Edge** Open screen for constituents appears for you to select a constituent record on which to add the action.

The following information is included in an action created from an incoming email.

- **Constituent** - the constituent you select on the Open screen
- **Category** - Email
- **Action type** - Specified as business rule
- **Action date** - Date from email
- **Start/End time** - blank
- **Solicitors** - Pulled from user name, if applicable (the solicitor selected for that user in Security is used)
- **Status** - blank
- **Action completed** checkbox - marked
- **Action completed on** - Today's date
- **Email** - If the constituent record to which the action is being added has only one email address, it defaults as the entry. If the constituent has multiple email addresses, the field is blank (although you can later select an email address on the action record).
- **Auto-remind** checkbox - not marked (and all other fields blank)
- **Priority** - Normal
- **Campaign** - blank
- **Fund** - blank
- **Proposal** - blank

The complete text of the email (as well as any attachments within the acceptable size range you specify in *Configuration*, Business Rules) is saved as a notepad.

If no information is available for any fields required to save the action, when you try to save it, a message informs you that additional information is required and the action opens for you to enter information in the appropriate field.

Creating Actions and Outlook Security

The latest versions of *Office* have a security feature to prevent viruses from accessing *Outlook's* address book and sending messages without your knowledge. When you click the **Create Action** button, *The Raiser's Edge* attempts to connect with *Outlook* and a message appears asking whether you want to allow it. You have three choices:

• Click **No** and deny the access

• Click **Yes** and allow one-time access

• Specify an amount of time (by default, one minute) that *The Raiser's Edge* can access *Outlook*

If you select the first option, an explanation appears and no message is sent. If you select the third option, the email is sent and the action is created.

If you select the second option (allowing one-time access), numerous access warning messages may appear even though you are creating an action from a single email*. The Raiser's Edge* must access *Outlook* several times to create an action, and each access causes a separate warning message to display. To avoid numerous appearances of the security message, you should allow *The Raiser's Edge* to access *Outlook* for one minute.

Linking Records Offline

When you are working offline, whether on a laptop in a remote location or on a computer not connected to *The Raiser's Edge* database, you can specify that *Outlook* records be linked with *The Raiser's Edge* the next time the two programs are synchronized.

▸   **Linking Outlook contact records with Raiser's Edge records offline**

1. From the *Outlook* toolbar, click **The Raiser's Edge**. If you are currently online and want to work offline, click **Work Offline**.

   When you select to work offline, the **Options** and **Synchronize** buttons are grayed out and disabled. You can set options and synchronize only when *The Raiser's Edge* database is online.

2. Open the *Outlook* contact record you want to link with a record in **The Raiser's Edge**.

3. From the toolbar, click **Create link**. A drop-down menu appears.

    For *Outlook 2010*, the toolbar appears on the Add-Ins tab of the *Outlook* menu bar.

4. Select the **Raiser's Edge** record type you want to create for this contact: **Individual**, **Organization** or **Contact at an organization**. A message appears.
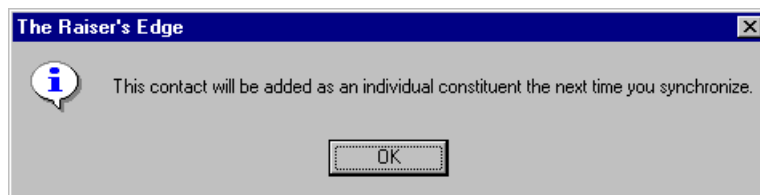
5. Click **OK**. You return to the contact record. "Raiser's Edge Contact" is added to the **Category** field on the contact record.

    Depending on how much information is in the contact record, the next time you synchronize, the contact is either added to **The Raiser's Edge** as the type of record you selected, or the Contact Conflicts screen appears asking you for additional information **The Raiser's Edge** needs to save the record. For example, information for a required field in **The Raiser's Edge** may not be included in the contact record.

    The Contact Linking Wizard guides you through the process of resolving conflicts and filling in any required information on the record itself. For more information about synchronizing, see "Synchronization Conflicts" on page 189.

▶ **Linking Outlook appointment records with Raiser's Edge records offline**

1. From the *Outlook* toolbar, click **The Raiser's Edge**. If you are currently online and want to work offline, click **Work Offline**.

   When you select to work offline, the **Options** and **Synchronize** buttons are grayed out and disabled. You can set options and synchronize only when *The Raiser's Edge* database is online.

2. Open the *Outlook* appointment record you want to link with a record in *The Raiser's Edge*.

3. From the toolbar, click **Create link**. A drop-down menu appears.

   For *Outlook 2010*, the toolbar appears on the Add-Ins tab of the *Outlook* menu bar.

4. Select the *Raiser's Edge* record type you want to link with this appointment: **Action**, **Event** (available if you have the optional module *Event Management*), or **Appeal**. A message appears.
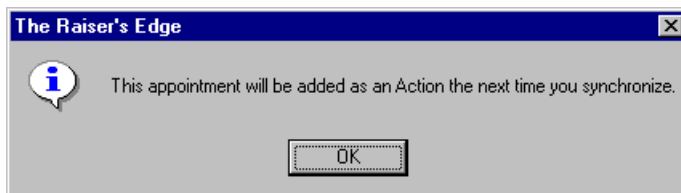
5. Click **OK**. You return to the appointment record. "Raiser's Edge Appointment" is added to the **Category** field on the appointment record.

6. If you are linking the appointment with an action, in the **Contacts** field in the *Outlook* appointment, you can specify a contact (constituent or event) who is already linked with *The Raiser's Edge* in order to link the appointment as an action to that constituent or event.

7. Depending on how much information is in the appointment record, and the type of *Raiser's Edge* record you specified to link it with, the next time you synchronize, the appointment is either linked to *The Raiser's Edge*, or the Appointment Conflicts screen appears asking you for additional information *The Raiser's Edge* needs to save the record.

   For example, if you are linking to an action and you do not select a linked contact in the **Contacts** field on the *Outlook* record, when you synchronize, a conflict arises and the Appointment Conflicts screen appears.

The Appointment Linking Wizard guides you through the process of resolving conflicts and filling in any required information on the record itself. For more information about synchronizing, see "Synchronization Conflicts" on page 189.

▶ **Linking Outlook task records with Raiser's Edge records offline**

    1. From the *Outlook* toolbar, click **The Raiser's Edge**. If you are currently online and want to work offline, click **Work Offline**.

       When you select to work offline, the **Options** and **Synchronize** buttons are grayed out and disabled. You can set options and synchronize only when *The Raiser's Edge* database is online.

    2. Open the *Outlook* task record you want to link to a record in *The Raiser's Edge*.
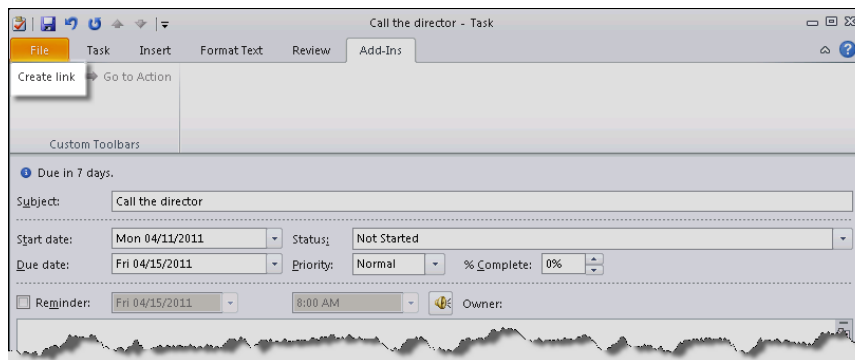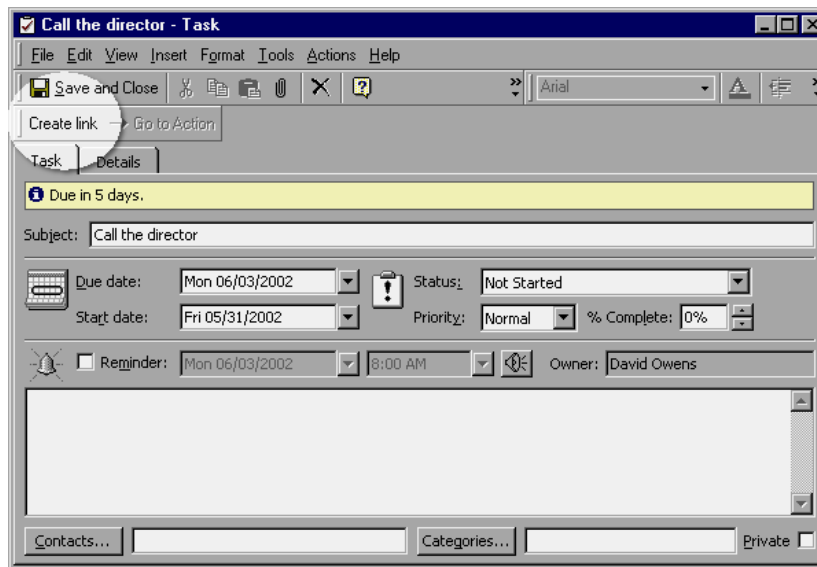
    3. From the toolbar, click **Create link**. A message appears.

       For *Outlook 2010*, the toolbar appears on the Add-Ins tab of the *Outlook* menu bar.
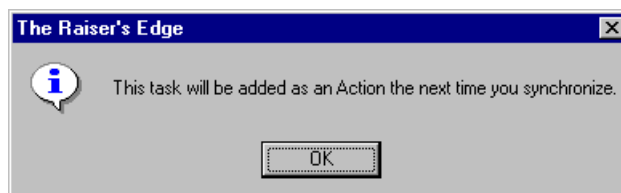
4. Click **OK**. You return to the task record. "Raiser's Edge Task" is added to the **Categories** field on the task record.

In the **Contacts** field in the *Outlook* task, you can specify a contact (constituent or event) who is already linked with *The Raiser's Edge* in order to link the task as an action to that constituent or event. If you do not select a contact in the **Contacts** field, when you synchronize, a conflict arises and you must select a constituent or event at that time. For more information, see "Synchronization Conflicts" on page 189.

The next time you synchronize, the task is added to *The Raiser's Edge* as an action. For more information about synchronizing, see "Synchronizing The Raiser's Edge With Outlook" on page 186.

Breaking Links Between Outlook and Raiser's Edge Records

From an *Outlook* contact, appointment, or task record, you can break the link between it and a *Raiser's Edge* record.

▶ **Breaking the link between an Outlook record and a Raiser's Edge record**

This procedure demonstrates how to break the link between an *Outlook* contact and a *Raiser's Edge* constituent. You would follow similar steps to break links between *Outlook* calendar appointments and tasks and *Raiser's Edge* actions and events.

1. From *Outlook*, open the contact record with which you want to break the link with *The Raiser's Edge*.
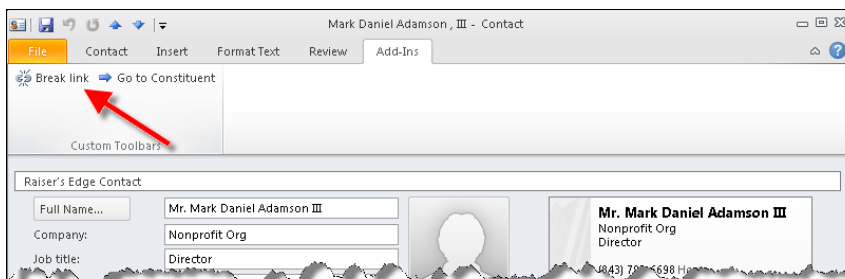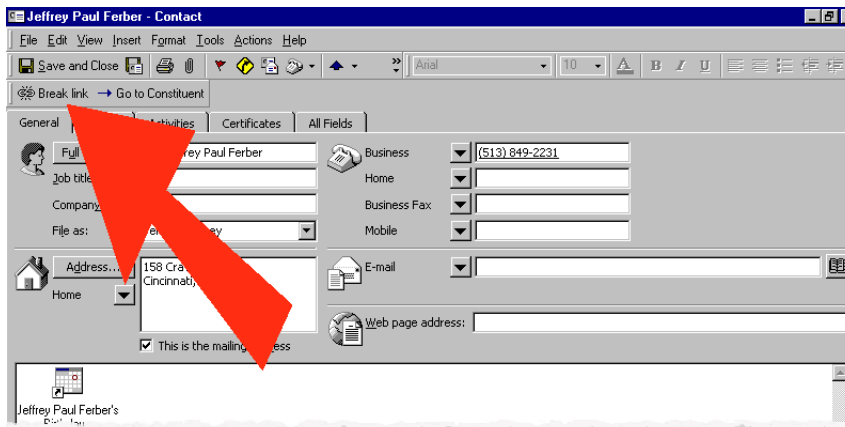
2. In the toolbar, click **Break Link**. A message appears verifying that you want to break the link for the selected contact.

    For *Outlook 2010*, the toolbar appears on the Add-Ins tab of the *Outlook* menu bar.

3. Click **Yes**.

    The link is broken and the contact record closes. When you open the contact record, the **Go to** button is no longer enabled, and the **Create Link** button appears on the toolbar

Outlook Field Mappings

When you synchronize **The Raiser's Edge** and *Outlook*, values from **Raiser's Edge** fields are mapped to corresponding fields in *Outlook* records and vice versa. The section shows the field mappings between the two programs.

Outlook Contact Field Mappings

Individual Biographical Fields

The following **Raiser's Edge** fields refer to both the constituent record and the individual relationship record.

The Raiser's Edge	Outlook
Title 1	Title
First Name	First Name
Middle Name	Middle Name
Last Name	Last Name
Suffix 1	Suffix
Nickname	Nickname
Birth date	Birthday

Organization Biographical Fields

The following fields refer to both the constituent record and the individual relationship record.

The Raiser's Edge	Outlook
Org Name	Company Name

Primary Business Fields (Organization Relationship)

The following fields refer to organization relationships.

The Raiser's Edge	Outlook
Profession	Profession
Position	Job Title

Address Fields

In the following table, "<type>" refers to Home or Business address.

The Raiser's Edge	Outlook
City	<type>City

The Raiser's Edge	Outlook
Country	<type>Country
Zip	<type>Postal Code
State	<type>State
Address Lines	<type>Street

Phone Fields

Phone numbers are pulled from the selected address and matched to the fixed list of phone types in *Outlook*. If a match is found, the phone number is added to *Outlook*.

The same process occurs with phone information going from *Outlook* to **The Raiser's Edge**, except that if the phone type is not found, it is added as a **Phone Type** table entry, and the phone number is added.

Email Fields

For existing **Raiser's Edge** **Phone type** email table entries to map automatically to the *Outlook* contact email fields, the **Raiser's Edge** type names must exactly match those in *Outlook*. For example, your table entries in **The Raiser's Edge** must be "E-mail," "E-mail 2," and "E-mail 3" (not "e-mail," "Email," or any other spelling variation).

Outlook Appointment Field Mappings

Appointment/Action Fields

The following fields are mapped between appointments and actions.

Outlook Appointment	Raiser's Edge Action
Subject	Derived from constituent or event name and action category (or type)*
Start	Start time**
End	End time***
Location	Location
Importance	Priority
Busy Status	Set according to synchronization option
Reminder	Set according to synchronization option

*This field is only synchronized from **The Raiser's Edge** to *Outlook*. For actions created from *Outlook* records, the **Subject** appears in the **Note** box on the action record.

If there is no start and end time, the appointment is flagged as an all-day event. If no time is specified in **The Raiser's Edge, the appointment is scheduled for 8 a.m.

***If no end time is specified in **The Raiser's Edge**, the duration of the appointment is set to thirty minutes.

Appointment/Event Fields

The following fields are mapped between appointments and events.

Outlook Appointment	Raiser's Edge Event
Subject	Name*
Start	Start date, Start time**
End	End date, End time***
Location	Location

*This field is only synchronized from **The Raiser's Edge** to *Outlook* for existing events. Events of the category "class" are not supported in the integration. If you change the category of a linked event to "class," a conflict is generated the next time you synchronize.

If there is no start date for the event, a conflict is generated and you must add a start date to the event in **The Raiser's Edge. If there is no start and end time, the appointment is flagged as an all-day event. If no time is specified in **The Raiser's Edge**, the appointment is scheduled for 8 a.m.

***If no end time is specified in **The Raiser's Edge**, the duration of the appointment is set to thirty minutes.

Appointment/Appeal Fields

The following fields are mapped between appointments and appeals.

Outlook Appointment	Raiser's Edge Appeal
Subject	Appeal Desc*
Start	Start date**
End	End date
Note	Notes

*This field is only synchronized from **The Raiser's Edge** to *Outlook* for existing appeals.

**If there is no start date for the appeal, a conflict is generated. If there is a start date, the appointment is flagged as an all day appointment on that date in the *Outlook* calendar.

Contact/Event Fields

This record is created only when you mark the **Create Outlook contact record for each event** checkbox on the Advanced Event Options screen. For more information, see "Specifying Calendar and Task synchronization options" on page 181.

Outlook Contact	Raiser's Edge Event
File As	"| Event Name |"

When you create appointments from events you can also create a contact record for the event. The contact name displays as "| Event Name |" to distinguish it from other contacts. Adding a contact in this manner enables you to access the Activities tab of a contact record in *Outlook* to see all other record types (appointments, tasks, etc.) associated with the contact (which in this case is an event rather than a person).

Contact/Appeal Fields

This record is created only when you mark the **Create Outlook contact record for each appeal** checkbox on the Advanced Appeal Options screen. For more information, see "Specifying Calendar and Task synchronization options" on page 181.

Outlook Contact	Raiser's Edge Event
File As	"| Appeal Name |"

When you create appointments from appeals you can also create a contact record for the appeal. The contact name displays as "| Appeal Name |" to distinguish it from other contacts. Adding a contact in this manner enables you to access the Activities tab of a contact record in *Outlook* to see all other record types (appointments, tasks, etc.) associated with the contact (which in this case is an appeal rather than a person).

Outlook Task Field Mappings

Task/Action Fields

The following fields are mapped between tasks and actions.

Outlook Task	Raiser's Edge
Subject	Derived from constituent or event name, action category (or type), and other pertinent information (for example, phone number, letter code, or email address)*
Start Date	Action date
Due Date	Action date
Importance	Priority
Complete	Action completed
Date Completed	Action completed date
Status	Status
Reminder	Set according to synchronization option

*This field is synchronized only from **The Raiser's Edge** to *Outlook*. For tasks brought into **The Raiser's Edge** as actions, the **Subject** appears as a notepad on the action record.

Status Mapping

The following statuses are mapped between the two programs.

Outlook Status	Raiser's Edge Status
Not Started	Not Started
In Progress	In Progress
Completed	Completed
Waiting on Someone Else	Waiting on Someone Else
Deferred	Deferred
Not Started	<any other code>

Troubleshooting Outlook Integration

The Raiser's Edge integration toolbar buttons are not visible in Outlook... You may need to manually add The Raiser's Edge Outlook Integration components. For more information, see "Manually Installing or Removing the Outlook Integration COM Add-In" on page 172.

When I try to synchronize the programs, the Collaboration Data Objects (CDO) begin installing...
If I cancel the installation, I get a message: "Could not install Collaboration Data Objects for the following reason: Failed to install OutlookCDO: ConfigureFeature,Product,Feature,InstallState. Please install CDO before using The Raiser's Edge Outlook Synchronization tool."

Before you can use the Office Integration features of **The Raiser's Edge**, you must install the Collaboration Data Objects (CDO). During some default installations of *Office*, the CDO are not installed. For example, the default installation of *Office XP* does not include the CDO.

If you do not have the CDO installed, when you open *Outlook*, it attempts to install the missing components which are available on your *Office* CD.

Warning: If you use *2007*, you must download Collaboration Data Objects, version 1.2.1, from www.microsoft.com.

If you click **Cancel** instead of installing the CDO, a message appears informing you that you must install CDO before using *The Raiser's Edge* *Outlook* Synchronization. For more information, see "Office Collaboration Data Objects (CDO)" on page 171.

Outlook Integration works for me on a machine, but when someone logs into the machine under their user name, the toolbar buttons do not appear in Outlook... Office Integration is only active by default for the profile used to install *The Raiser's Edge*. If you have multiple users under different profiles on the same machine, you must add the office integration plug-in manually for each of these profiles. For more information, see "Manually Installing or Removing the Outlook Integration COM Add-In" on page 172.

Area codes for phone numbers I add in Outlook are always my area code... Phone numbers without an area code are assigned the one set in the default location of the machine per Control Panel settings. Because this occurs only for phone numbers without an area code, you can avoid this by always entering the area code on the record.

Some international phone numbers on Outlook contact records change formatting after linking the contact to The Raiser's Edge and synchronizing the records. Because you may have different phone formats set up in *Outlook* and *The Raiser's Edge*, the format of the phone number in the *Outlook* contact record may change when you synchronize records. During synchronization, the *Outlook* phone number is copied to *The Raiser's Edge* where it is formatted to one of the available formats and copied back to *Outlook* in that format. If you select a format of <None> in *The Raiser's Edge* for the "Home" phone type, your *Outlook* formatting will remain unchanged after synchronization. Phone number formats for phone table entries are assigned in the Tables section of *Configuration* in *The Raiser's Edge*.

Whenever I synchronize, I get an Outlook warning message about email security... Anytime an *Outlook* contact email field is synchronized, an *Outlook* security message appears. If an *Outlook* contact record has more than one email address (E-mail 1,2, or 3), when you click **Yes** on the message, *Outlook* approves that operation and goes to the next field. So when you click **Yes**, the message immediately appears again when the integration checks the next synchronized email field.

If you click **No** on the message, another message appears saying that email addresses will no longer be synchronized, and the **Synchronize email** checkbox on the Options/Contacts tab is automatically unmarked. This means you cannot share email address information between the programs, but the security message will no longer appear.

You can also "stall" the *Outlook* message box by marking **Allow access for** and selecting a time frame up to ten minutes.

Whenever I synchronize email addresses in Outlook, the Internet Format option for sending email always defaults to "Let Outlook decide the best sending format"... On a contact record in *Office XP* or *2003*, you can double-click the e-mail address to open a screen which includes options for the **Internet Format** to use when sending e-mails. There are three options, **Let Outlook decide the best sending format**, **Send Plain Text only**, and **Send using Outlook Rich Text Format**.

If you change the **Internet Format** in *Outlook* to the second or third option, edit the email address in *The Raiser's Edge*, then synchronize to update the email address in *Outlook*, the **Internet Format** option is reset to the third option, **Let Outlook decide the best sending format**.

In *Outlook 2000*, the only option is a **Send As Plain Text** checkbox on the Outlook Contact screen. This checkbox does retain its value even when updating email addresses from *The Raiser's Edge* to *Outlook*.

Some company names for contacts I add in Outlook sort differently than company names for contacts created from Raiser's Edge records... *Outlook* moves text such as "The" to the end of a company name when you create a contact, for alphabetical sorting. When a *Raiser's Edge* organization constituent is added as an *Outlook* contact, the name does not change (for example, from *The Flower Pot* to *Flower Pot, The*).

After synchronizing email addresses, I cannot open some encrypted email with my digital ID certificate... When you change an email address, some digital ID certificates may be invalidated. Digital IDs linked to email addresses in your Contacts folder are the keys that allow you to read encrypted emails received from your contacts. If a contact's email address changes, the digital ID key you have for that contact is no longer valid. You need to get another digital ID from the contact before you can read an encrypted email from that contact.

I previously marked the option to synchronize records. Now I have unmarked it, but previously linked records continue to synchronize. Once records are linked, they continue to synchronize even if you later unmark the **Synchronize** checkbox on a tab of the Options screen. This checkbox controls adding new records to *Outlook* from **The Raiser's Edge** during synchronization. If you want to break the link between existing records, you must do so manually. For more information, see "Breaking Links Between Outlook and Raiser's Edge Records" on page 219.

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