

The Raiser's Edge™

NetSolutions Guide

020112

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Registering with NetSolutions



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Warning: Depending on the processor used by your Internet Merchant Account issuer, a separate terminal ID may be required if you are going to use multiple credit card processes and processors. Check with your issuer before you start accepting online donations.

NetSolutions is comprised of a number of components, working together, connecting you with your donors via the Internet. All these components rely on services hosted by Blackbaud. We maintain the servers, host the *NetSolutions* Web pages, and collect the constituent data entered from these Web pages.

System Requirements

- An Internet connection.
- ***The Raiser's Edge 7.x***.
- Fax verification [IRS Determination Letter, 501(c)(3)] of the organization's tax-exempt status to 1-843-216-6104.

NetSolutions fully supports only Microsoft's *Internet Explorer Browser*, however, donors can also use HTML 3.2-compliant browsers as well.

- *Internet Explorer 5.x* (fully supported) is needed to set up your Web pages and download transactions. However, you can also use any HTML 3.2 compliant browsers
- A merchant account with an authorization service such as *Blackbaud Merchant Services* or *Interational Automated Ticket Systems (IATS)*
- No additional hardware requirements beyond what you need to run ***The Raiser's Edge***.

Security

Warning: The privilege to download transactions implies the user can also create a batch. The user assigned downloading privileges can create the *NetSolutions* batch even if the ***Raiser's Edge*** "Create Batch" privilege has not been assigned.

User rights are assigned in **Security**, accessed by clicking **Admin** on the *Raiser's Edge* bar. The security settings affect only your users' ability to access the *NetSolutions* functions. Users also need applicable ***Raiser's Edge*** rights, corresponding to the functions they perform in *NetSolutions*. For example, to edit the membership category in **NetMembers** a user must have rights to edit *Membership Management* in ***The Raiser's Edge***.

Also, to avoid problems, you may want to consider assigning the user downloading transactions from your *NetSolutions* Web page(s) administrative rights. For example, if the user does not have rights to see credit card numbers in ***The Raiser's Edge***, the user cannot download credit card transactions, regardless of his *NetSolutions* rights. For more information about security, see the Security chapter in the *Configuration & Security Guide*.

Warning: If a user has the *NetSolutions* privileges to access funds, he can search and select funds from the drop-down list available throughout the program, even if he does not have the appropriate ***Raiser's Edge*** rights.

To protect your online constituents, Blackbaud uses Secure Sockets Layer (SSL) technology. SSL is the leading industry protocol that provides security for transmitting personal information over the Internet, keeping your donor's personal information secure. This means that credit card numbers are encrypted and cannot be copied. Your browser displays a lock or key on the browser status bar, indicating encryption is activated.

Registering with NetSolutions (The Raiser's Edge 7.85 or lower)

If you already registered with Blackbaud, a message appears telling you to enter your Login ID and Login password. You enter this information in **Configure & Customize**. For more information, see "Configure & Customize" on page 11.

Before you start working in *NetSolutions*, you must register with Blackbaud. To access the NetSolutions Registration page, click **NetSolutions** on the Raiser's Edge bar. If you purchased the service but did not register, the online registration screen appears. Once you complete the registration page and submit it to Blackbaud, we contact you via email, telling you when your registration application is processed. You are then free to work in *NetSolutions*.

The Registration Page

Before you can register with *NetSolutions*, you must establish a merchant account with International Automated Ticket Systems (IATS). This account allows you to accept online donations using *NetSolutions*.

When you complete the *NetSolutions* online registration form, click **Submit**. Your information is transmitted to Blackbaud, and your *NetSolutions* account is established. Blackbaud confirms your registration via email. Once registered, you are ready to work in *NetSolutions*, customizing your donation page, accepting online donations, accepting online registration to events, and much more.

Establishing a Merchant Account

Before you can register with *NetSolutions*, you must establish a merchant account with International Automated Ticket Systems (IATS). This account allows you to accept online donations using *NetSolutions*. To establish an account with IATS, visit the website at www.iatspayments.com/SetupDocs/BBNSNC/bb.html.

After you establish your account, you are ready to register with *NetSolutions*.

Warning: Depending on the processor used by your merchant account issuer, a separate terminal ID may be required if you use multiple credit card processes and processors. Check with your issuer before you start to accept online donations.

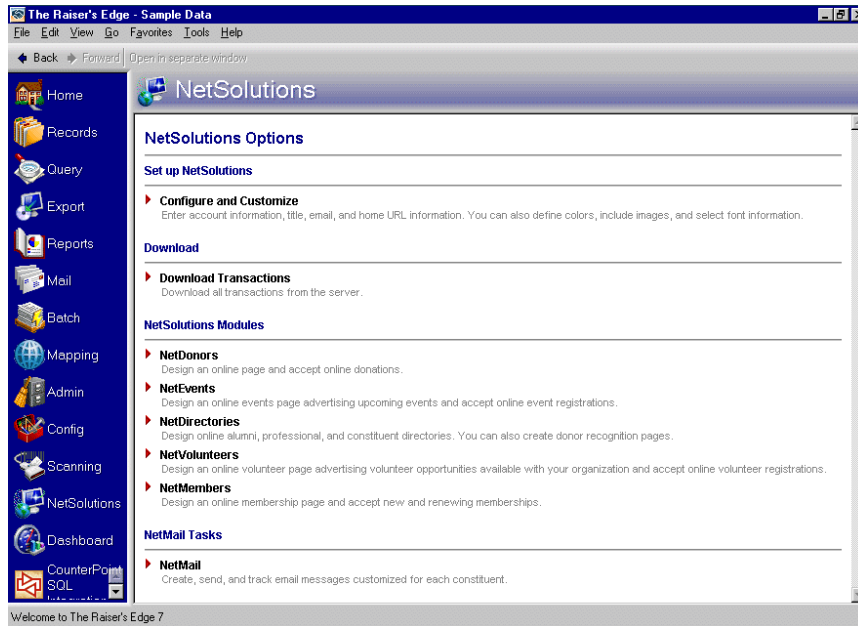
Completing the Registration Page

The following procedure shows you how to complete the *NetSolutions* registration page. You must have your merchant account information to complete the registration.

► Registering with NetSolutions

Warning: Registration information included in this guide is subject to change. For the most up-to-date information, use the *NetSolutions Guide* included on the Blackbaud website at www.blackbaud.com.

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



Note: For information about purchasing *NetSolutions*, see the Blackbaud website at www.blackbaud.com.

If you purchased the product but have not registered, a screen appears offering to link you to the registration page.

2. Click **OK**. The registration page appears. The first half of the page includes instructions about how to register. You must have merchant account to complete your *NetSolutions* registration.
3. The second section of the NetSolutions Registration page includes the **Nonprofit Registration Information** frame. In this section, enter basic biographical information about your organization.

Nonprofit Registration Information	
Name*	World Wildlife Protection Association
Address*	25 Water St.
City, State ZIP*	Charleston, SC 29401
Country*	United States
Phone*	(843) 555-1234
Fax	
Email*	WWPA@wwpa.org
The Raiser's Edge S/N*	wre11111
Login ID*	WPA99
Password*	*****
Retype Password*	*****
Reminder Phrase*	founder's name
URL (include http://)*	http://logo

4. You must complete all required fields. Required fields include an * after the field name. Enter the **Login ID** and **Password** provided by your credit card processor for your authorization service merchant account. You must also enter your organization's URL in the **URL** field.

5. In the **NetSolutions Primary Contact Information** frame, enter information about the person Blackbaud should call when we need to contact your organization. Required fields include an * after the field name.

Primary Contact Information	
First Name*	Karen
Last Name*	Bruce
Phone*	(843) 555-6543
Fax	(843) 555-1234
E-Mail*	karenbr@wlpa.org

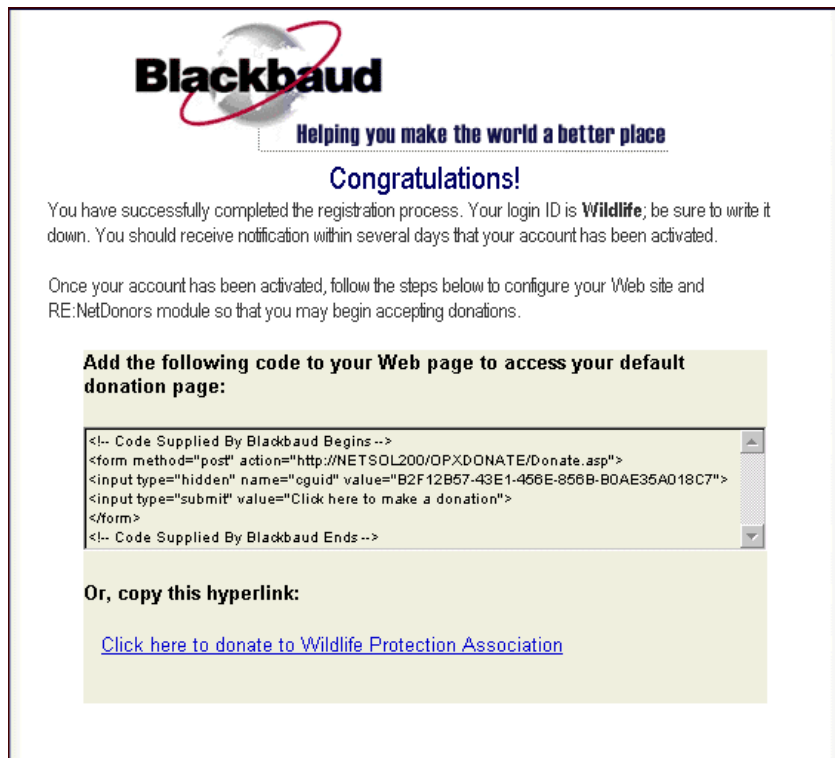
Warning: Registration information included in this guide is subject to change. For the most up-to-date information, use the *NetSolutions Guide* included on the Blackbaud website at www.blackbaud.com.

6. Complete the **IATS Account Information** frame. IATS provides the information needed to complete this section when you create an account with them.

IATS Account Information															
Acquirer* (aka Issuer)	IATS														
Acquirer Contact*	Mr. Andrew Mosawi														
Acquirer Phone*	866-555-8220														
Currency Type*	United States Dollars (\$)														
Credit Cards Accepted*	<table border="1"><thead><tr><th>Type</th><th>Processor to use</th></tr></thead><tbody><tr><td>☒ Visa</td><td>IATS</td></tr><tr><td>☒ MasterCard</td><td>IATS</td></tr><tr><td>☒ American Express</td><td>IATS</td></tr><tr><td>☒ Discover</td><td>IATS</td></tr><tr><td>☒ Diner's Club</td><td>IATS</td></tr><tr><td>☒ Switch/Solo</td><td>IATS</td></tr></tbody></table>	Type	Processor to use	☒ Visa	IATS	☒ MasterCard	IATS	☒ American Express	IATS	☒ Discover	IATS	☒ Diner's Club	IATS	☒ Switch/Solo	IATS
Type	Processor to use														
☒ Visa	IATS														
☒ MasterCard	IATS														
☒ American Express	IATS														
☒ Discover	IATS														
☒ Diner's Club	IATS														
☒ Switch/Solo	IATS														
Note: IATS can process all of the cards listed above.															

Warning: Depending on the processor used by your IATS/Internet Merchant Account issuer, a separate terminal ID may be required if you are going to use multiple credit card processes and processors. Check with your issuer before you start accepting online donations.

7. Click **Submit**. A page appears confirming your registration and displays your login ID. Instructions on configuring your Web page are also included.



8. To start accepting donations online, copy the block of code provided and paste it to your Web page. We recommend that someone familiar with the design of your Web page add this code.

Note: You cannot accept donations until Blackbaud activates your account. We suggest you wait until after your account is activated to add the button to your Web page.

Once your account is activated, on the Blackbaud confirmation page, you can also click the **Click here to donate to** link and run through an example of the donating process.

You are notified via email when Blackbaud activates your account.

9. To return to the NetSolutions page, click **NetSolutions** on the Raiser's Edge bar. You are now ready to configure and customize your Blackbaud Web pages. For information, see "Configure & Customize" on page 11

Registering with NetSolutions (The Raiser's Edge 7.9 or higher)

Note: If you already registered with Blackbaud, a message appears telling you to enter your Login ID and Login password. You enter this information in **Configure & Customize**. For more information, see "Configure & Customize" on page 11.

Before you start working in *NetSolutions*, you must register with Blackbaud. To access the NetSolutions Registration page, click **NetSolutions** on the Raiser's Edge bar. If you purchased the service but did not register, the online registration screen appears. Once you complete the registration page and submit it to Blackbaud, we contact you via email, telling you when your registration application is processed. You are then free to work in *NetSolutions*.

The Registration Page

Before you can register with *NetSolutions*, you must establish a merchant account with an credit card authorization service such as *Blackbaud Merchant Services* or International Automated Ticket Systems (IATS). This account allows you to accept online donations using *NetSolutions*.

Note: For more information about how to set up an account with *Blackbaud Merchant Services*, refer to *Getting Started with Blackbaud Merchant Services* at <http://www.blackbaud.com/files/support/guides/bbps/bbmstart.pdf>.

- To establish an account with *Blackbaud Merchant Services*, visit the website at <https://bbmsmerchant.blackbaud.com>.
- To establish an account with IATS, visit the website at www.iatspayments.com/SetupDocs/BBNSNC/bb.html.

When you complete the *NetSolutions* online registration form, click **Submit**. Your information is transmitted to Blackbaud, and your *NetSolutions* account is established. Blackbaud confirms your registration via email. Once registered, you are ready to work in *NetSolutions*, customizing your donation page, accepting online donations, accepting online registration to events, and much more.

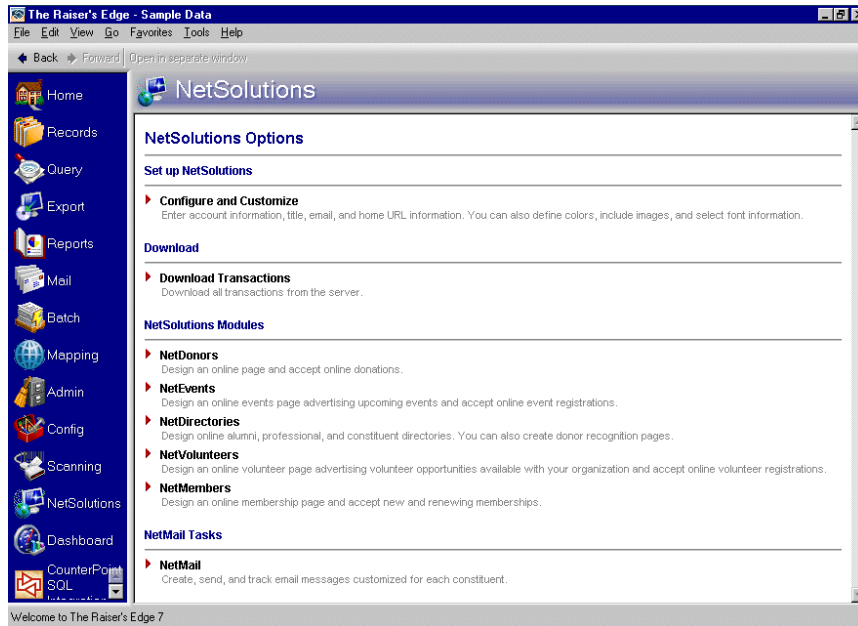
Completing the Registration Page

The following procedure shows you how to complete the *NetSolutions* registration page. You must have your merchant account information to complete the registration.

► Registering with NetSolutions

Warning: Registration information included in this guide is subject to change. For the most up-to-date information, use the *NetSolutions Guide* included on the Blackbaud website at www.blackbaud.com. Select **Support, User Guides** from the menu bar.

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



Note: For information about purchasing *NetSolutions*, see the Blackbaud website at: www.blackbaud.com.

If you purchased the product but have not registered, a screen appears offering to link you to the registration page.

2. Click **OK**. The registration page appears. The first half of the page includes instructions about how to register. You must have a merchant account to complete your *NetSolutions* registration.
3. The second section of the NetSolutions Registration page includes the **Nonprofit Registration Information** frame. In this section, enter basic biographical information about your organization.

Nonprofit Registration Information	
Name*	World Wildlife Protection Association
Address*	25 Water St.
City, State ZIP*	Charleston, SC 29401
Country*	United States
Phone*	(843) 555-1234
Fax	
Email*	WWPA@wwpa.org
The Raiser's Edge S/N*	wre11111
Login ID*	WPA99
Password*	*****
Retype Password*	*****
Reminder Phrase*	founder's name
URL (include http://)*	http://logo

4. You must complete all required fields. Required fields include an * after the field name. Enter the **Login ID** and **Password** provided by your merchant account provider. You must also enter your organization's URL in the **URL** field.

5. In the **NetSolutions Primary Contact Information** frame, enter information about the person Blackbaud should call when we need to contact your organization. Required fields include an * after the field name.

Primary Contact Information	
First Name*	Karen
Last Name*	Bruce
Phone*	(843) 555-6543
Fax	(843) 555-1234
E-Mail*	karenbr@wlp.org

Warning: Registration information included in this guide is subject to change. For the most up-to-date information, use the *NetSolutions Guide* included on the Blackbaud website at www.blackbaud.com.

6. Click **Submit**. A page appears confirming your registration and displays your login ID. Instructions on configuring your Web page are also included.



Blackbaud

Helping you make the world a better place

Congratulations!

You have successfully completed the registration process. Your login ID is **Wildlife**, be sure to write it down. You should receive notification within several days that your account has been activated.

Once your account has been activated, follow the steps below to configure your Web site and RE:NetDonors module so that you may begin accepting donations.

Add the following code to your Web page to access your default donation page:

```
<!-- Code Supplied By Blackbaud Begins -->
<form method="post" action="http://NETSQL200/OPXDONATE/Donate.asp">
<input type="hidden" name="oguid" value="B2F12B57-43E1-456E-856B-B0AE35A018C7">
<input type="submit" value="Click here to make a donation">
</form>
<!-- Code Supplied By Blackbaud Ends -->
```

Or, copy this hyperlink:

[Click here to donate to Wildlife Protection Association](#)

7. To start accepting donations online, copy the block of code provided and paste it to your Web page. We recommend that someone familiar with the design of your Web page add this code.

Note: You cannot accept donations until Blackbaud activates your account. We suggest you wait until after your account is activated to add the button to your Web page.

Once your account is activated, on the Blackbaud confirmation page, you can also click the **Click here to donate to** link and run through an example of the donating process.

You are notified via email when Blackbaud activates your account.

8. To return to the NetSolutions page, click **NetSolutions** on the Raiser's Edge bar. You are now ready to configure and customize your Blackbaud Web pages. For information, see "Configure & Customize" on page 11.

For information about entering merchant account information in ***The Raiser's Edge***, see the Business Rules section of the Configuration chapter in the *Configuration & Security Guide*.

Configure & Customize

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Blackbaud's *NetSolutions* is comprised of several components, working together to help you improve communications with your donors and to help you manage online donations, appeals, events, and more. To keep hardware requirements to a minimum, Blackbaud servers host these services. We maintain the servers and provide data interchange between the Internet and your *Raiser's Edge* database.

To make the online transactions between your Web site and the Blackbaud-hosted servers as seamless as possible, you can configure all aspects of the Web pages hosted by Blackbaud. Through the **Configure and Customize** link, you enter login, title, mission, email, and Home URL information. You also define colors, include images, and select font information. This chapter takes you step-by-step through the configuration and customization process.

Requirements for NetSolutions

To use this service, you must have the following:

- A Web page.
- **The Raiser's Edge 7.x**
- *Internet Explorer* 5.x or higher is fully supported; however donors can use HTML 3.2 compliant browsers as well.

Processing Credit Cards

In compliance with PCI rules, **The Raiser's Edge 7.9** and higher does not store credit card numbers locally or in the database; all numbers are stored remotely on the Blackbaud *Payment Service*. In addition, retention of credit card information associated with donor logins is not possible.

Note: You can edit existing merchant account information, including **Password** and **Login ID** credentials, from the **Business Rules** functionality accessed in *Config*. You can also add new merchant accounts.

If you use a version of **The Raiser's Edge** earlier than **7.86**, donation transactions process using a direct connection to IATS or PayPal; the *Blackbaud Payment Service* is not used for these transactions. In addition, credit card numbers are not included when downloading transactions to an older version of **The Raiser's Edge**.

After you upgrade from an older version of **The Raiser's Edge** to **7.9** or higher, you must resubmit your **NetSolutions** site configuration to Blackbaud to update your account on the server. To resubmit your configuration, click **Submit** from **Configure and Customize**. All existing merchant accounts are then sent to the *Blackbaud Payment Service* server. After your merchant account information transfers to *Blackbaud Payment Service*, the **Merchant account** field on the Account Information tab in **Configure and Customize** houses the merchant account created on the payment service server.

For more information, see "Account Information" on page 24.

Blackbaud Payment Service

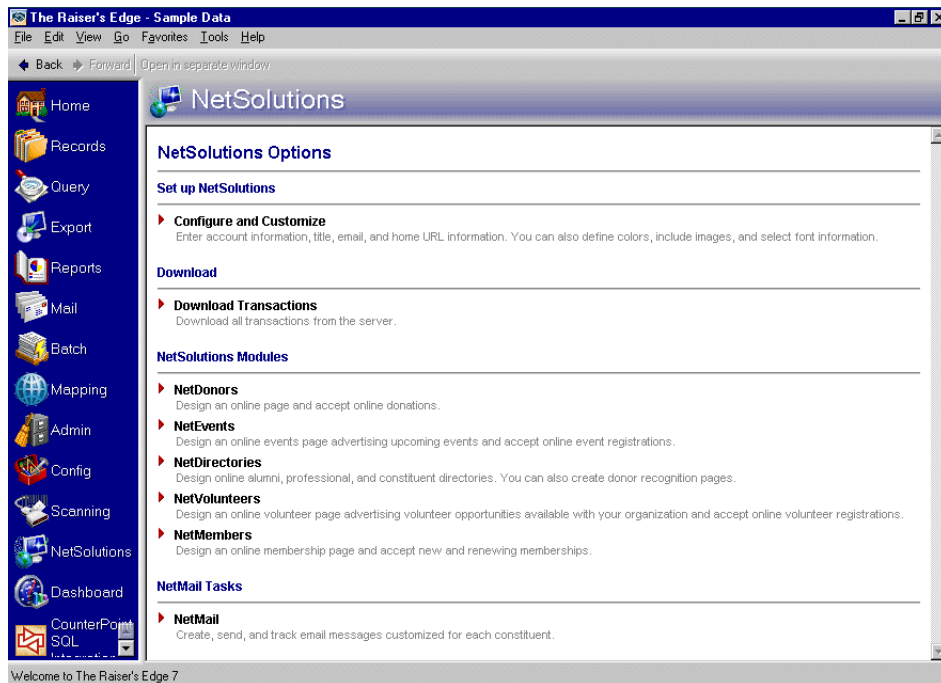
The *Blackbaud Payment Service* stores donor credit card information to a remote server. This method of storage complies with Payment Card Industry Data Security Standards (PCI DSS) and allows your organization to better protect your donors' credit card information.

The first time you open *NetSolutions* after you upgrade to **The Raiser's Edge 7.9** or higher from an earlier version of the application, a screen appears to inform you your *NetSolutions* account information does not exist in the *Blackbaud Payment Service*.

To move the information to the server, open **Configure and Customize** and click **Submit**. You cannot work in *NetSolutions* until you the credit card information appears in the *Blackbaud Payment Service*.

Navigating

In The Raiser's Edge, you access **Configure and Customize** through NetSolutions on the Raiser's Edge bar.



Accessing Configure and Customize

Warning: Before you start working in *NetSolutions*, you must register as a *NetSolutions* user. For more information, see “Registering with NetSolutions” on page 1.

Multiple users can access different areas of *NetSolutions* simultaneously.

► Accessing Configure and Customize

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

Note: Although the **Login password** field entry is masked, if you have Supervisor rights, you can access the password by highlighting the field and hitting **F7** on your keyboard.

2. Click **Configure and Customize**. The NetSolutions - Configure and Customize screen appears, displaying the Account Information tab.

Account Information
Enter your account and advocacy information on this page. This information is used to connect to the NetSolutions service and to the advocacy service.

Login ID:

Login password:

Serial number:

Merchant account:

Click here to test connection

Click here to view transaction statistics

Click here for advanced options

Advocacy login:

Advocacy password:

Enter the code to use when creating a new constituent record for an advocate:

Press F7 for table lookup

3. Complete all eight tabs. For more information about completing these tabs, see “Configuring Your Web Pages” on page 23.

Note: If you change your login identification or password, you must notify Blackbaud about the change.

4. To send your configuration specifications to Blackbaud, click **Submit**.
5. To exit this screen, click **Close**. You return to the NetSolutions page.

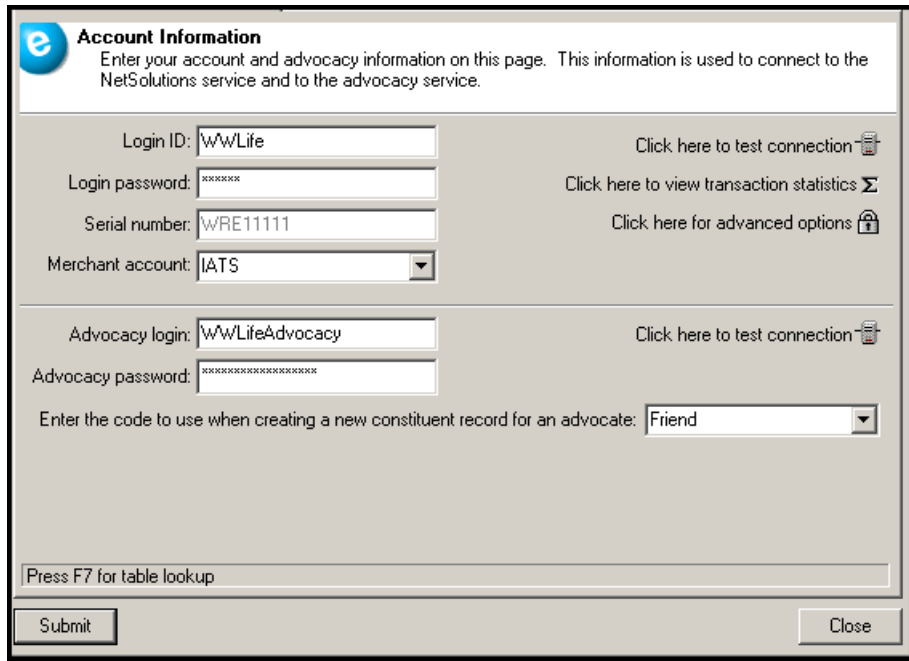
Tabs

Note: For information about *Capwiz*, go to: www.capwiz.com.

Eight tabs make up the NetSolutions - Configure and Customize screen. Every Web page designed adheres to the formatting instructions you select on these tabs.

Note: For more information about advocacy, see the Actions chapter of the *Constituent Data Entry Guide*.

Account Information. On the Account Information tab, enter the **Login ID** and **Login password** established when you registered for the product. Also, to download advocacy action data to *The Raiser's Edge*, you must enter your **Advocacy login** and **Advocacy password**. This is the same information you enter to access your *Capwiz* account. You may also specify the code to use when NetSolutions creates a new constituent in *The Raiser's Edge* by selecting it from the **Enter the code to use when creating a new constituent record for an advocate** drop down menu. Finally on this tab, you select the type of **Merchant account** your company uses to accept credit card information in *NetSolutions*.

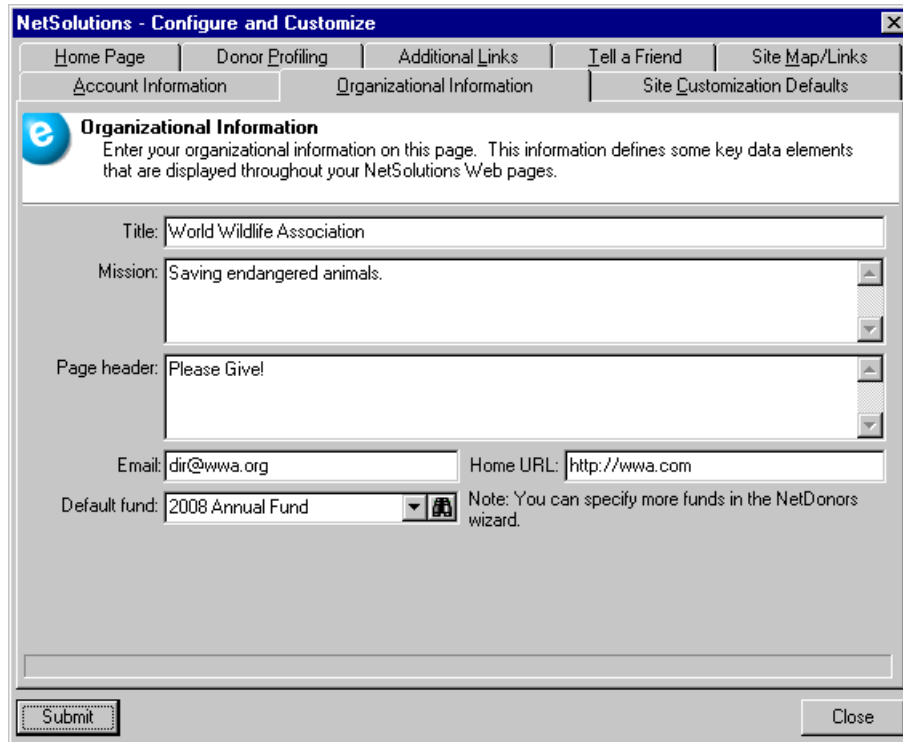


The screenshot shows the 'Account Information' tab in the NetSolutions interface. The form is titled 'Account Information' with a sub-header 'Enter your account and advocacy information on this page. This information is used to connect to the NetSolutions service and to the advocacy service.' The form contains two main sections. The first section is for the user's account, with fields for 'Login ID' (containing 'WwLife'), 'Login password' (masked with 'XXXXXXXX'), 'Serial number' (containing 'WRE11111'), and 'Merchant account' (a dropdown menu showing 'IATS'). To the right of these fields are three links: 'Click here to test connection' with a test icon, 'Click here to view transaction statistics' with a sigma icon, and 'Click here for advanced options' with a padlock icon. The second section is for advocacy information, with fields for 'Advocacy login' (containing 'WwLifeAdvocacy') and 'Advocacy password' (masked with 'XXXXXXXXXXXXXXXXXXXX'). To the right of these fields is another 'Click here to test connection' link with a test icon. Below the advocacy fields is a label 'Enter the code to use when creating a new constituent record for an advocate:' followed by a dropdown menu showing 'Friend'. At the bottom of the form is a status bar that says 'Press F7 for table lookup'. There are 'Submit' and 'Close' buttons at the bottom right.

For information about the **Click here to view transaction statistics** button, see page 25.

For information about the **Click here for advanced options** button, see page 26.

Organization Information. On the Organization Information tab, enter the **Title** you want to appear on your donation page, your **Email** address, and a **Default fund** to credit for all online donations not attributed to a specific **Raiser's Edge** fund. You can also include your **Mission** statement, a **Page header**, and your **Home URL**, providing a link to your Home page.



The screenshot shows a web browser window titled "NetSolutions - Configure and Customize". The window has a tabbed interface with the following tabs: "Home Page", "Donor Profiling", "Additional Links", "Tell a Friend", "Site Map/Links", "Account Information", "Organizational Information" (which is the active tab), and "Site Customization Defaults". The "Organizational Information" tab contains a blue circular icon with a white 'e' and the heading "Organizational Information". Below the heading is a descriptive text: "Enter your organizational information on this page. This information defines some key data elements that are displayed throughout your NetSolutions Web pages." The form fields are as follows: "Title" with the value "World Wildlife Association"; "Mission" with the value "Saving endangered animals."; "Page header" with the value "Please Give!"; "Email" with the value "dir@wwa.org"; "Home URL" with the value "http://wwa.com"; and "Default fund" with a dropdown menu showing "2008 Annual Fund". A small icon of a person is next to the "Default fund" dropdown. A note at the bottom right of the form states: "Note: You can specify more funds in the NetDonors wizard." At the bottom of the window are two buttons: "Submit" and "Close".

NetSolutions - Configure and Customize

Home Page | Donor Profiling | Additional Links | Tell a Friend | Site Map/Links

Account Information | **Organizational Information** | Site Customization Defaults

Organizational Information

Enter your organizational information on this page. This information defines some key data elements that are displayed throughout your NetSolutions Web pages.

Title: World Wildlife Association

Mission: Saving endangered animals.

Page header: Please Give!

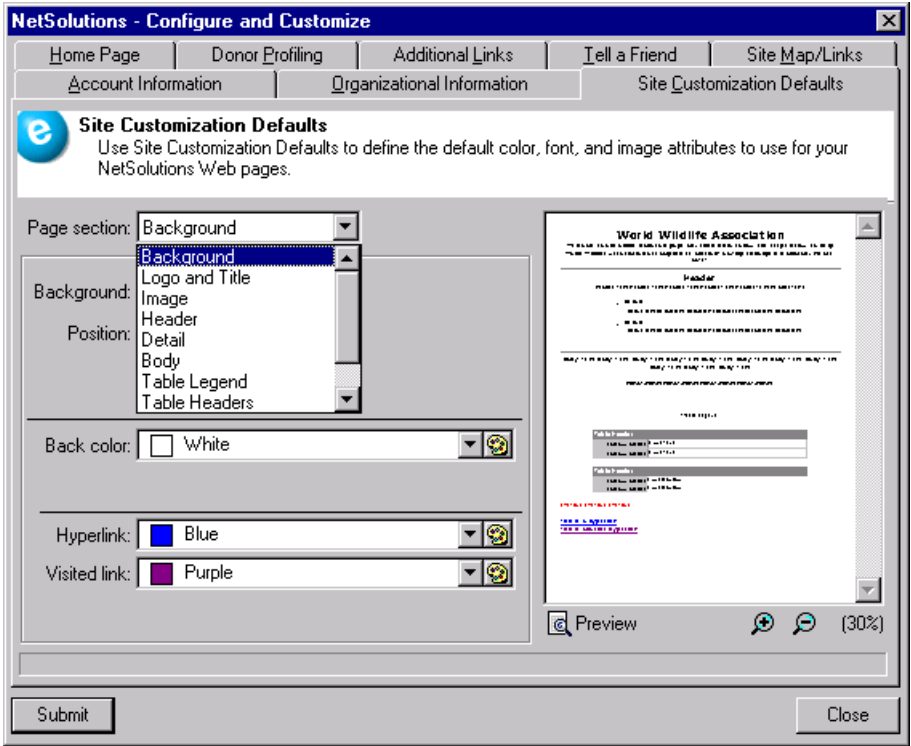
Email: dir@wwa.org Home URL: http://wwa.com

Default fund: 2008 Annual Fund

Note: You can specify more funds in the NetDonors wizard.

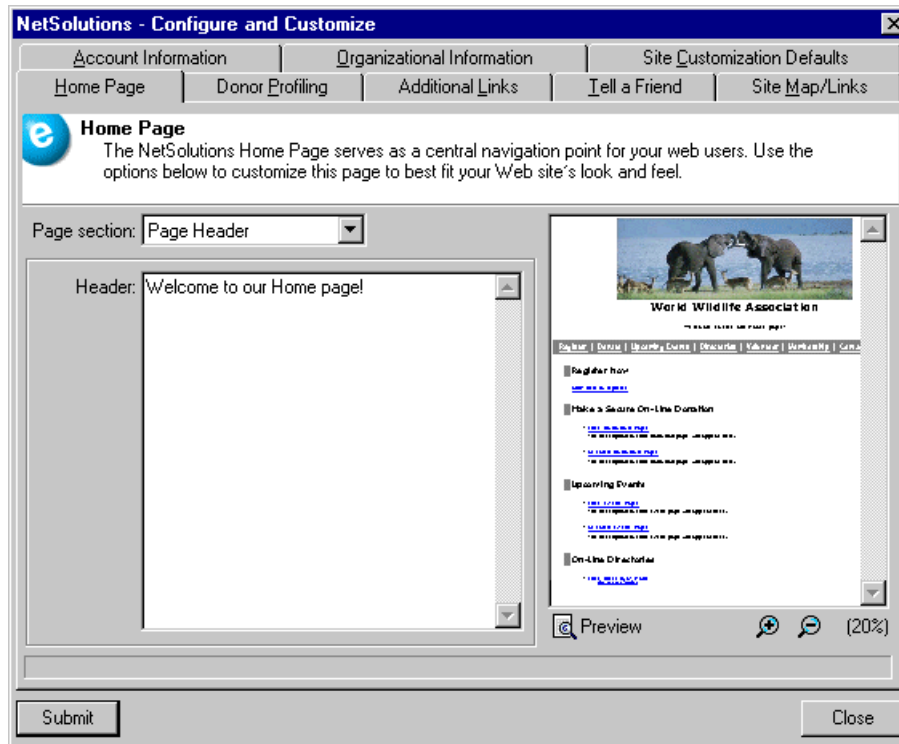
Submit Close

Site Customization Defaults. On the Site Customization Defaults tab, you select the section of the Web page to customize. You select the feature of your page that you want to modify from the **Page section** field. For example, you can design the Web page background, add an image and select font faces, font sizes, text color, and hyperlink color.



For information about completing this tab, see “Site Customization Defaults” on page 29.

Home page. On this tab, you design your *NetSolutions* Home page. This page provides your online constituents with links to all *NetSolutions* functions. You can accept the default page designed by Blackbaud, or you can design your own Home page. You identify the section of the Web page to define by selecting it from the **Page section** field. You may then alter the page's text to your liking. Changes made to the page are instantly reflected in the preview window on the right. You can view the full page in your web browser by clicking **Preview**.



For information about completing this tab, see “Home Page” on page 40.

Donor Profiling. On this tab, you can enter questions to appear on your online constituent registration form to help you better understand your donors. For example, if you want to know if donors are responding to a mailing you sent out, you can enter the question, “Did you receive our mailing?”. The question appears on the donation page with **Yes** and **No** options. This information is stored on the Attributes tab of the constituent record when you download donations.

The screenshot shows the 'NetSolutions - Configure and Customize' window with the 'Donor Profiling' tab selected. The window has a title bar and several tabs: 'Account Information', 'Organizational Information', 'Site Customization Defaults', 'Home Page', 'Donor Profiling' (active), 'Additional Links', 'Tell a Friend', and 'Site Map/Links'. Below the tabs, there is a section titled 'Donor Profiling' with a blue 'e' icon. The text reads: 'Use Donor Profiling questions to gather additional information from your Web users that will help segment, target, and cultivate your constituency. These questions will appear at the end of any registration page in NetSolutions that does not have specific questions specified.' Below this text is a table with two columns: 'Profiling Question' and 'Attribute to Use'. The first row contains the question 'Did you receive our mailing?' and the attribute 'Mailing'. There is a small edit icon (pencil) to the left of the question. Below the table is a large empty text area with a scrollbar. At the bottom of the window are 'Submit' and 'Close' buttons.

Profiling Question	Attribute to Use
Did you receive our mailing?	Mailing

The profiling questions you enter here function as program defaults. You can create Web page-specific questions in other areas of the program. For example, if you want a separate set of profiling questions asked just on your donation page, you can enter them in **NetDonors**. These questions will then appear just on your donation page.

Note: All additional links you define must have an image associated with them.

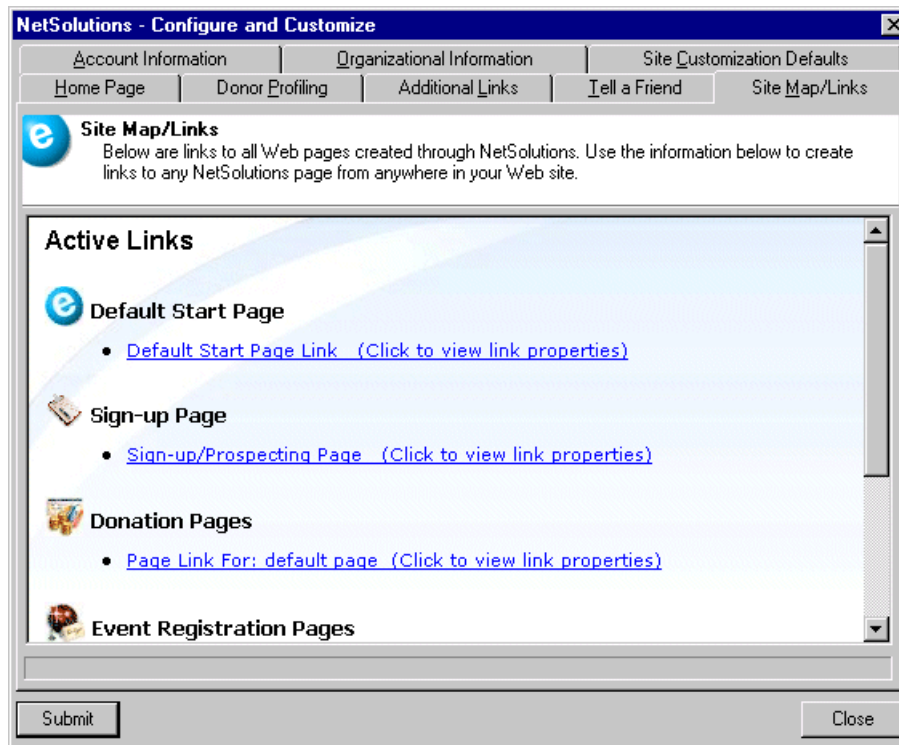
Additional Links. From the Additional Links tab, you can add links to related Web sites. For example, an animal protection organization wants to include a link on its online registration page taking visitors to an animal adoption Web site. This link can be added using the Additional Links tab.

Image	Caption	URL
<image>	Animals you can adopt.	http://adoptanimals.com

Tell a Friend. The Tell a Friend page is seen by your web site's users when they click the **Tell a Friend** link on your site. On the Tell a Friend tab, enter the text to be displayed on this page when visitors view it on your Web site (there is a 2,147,483,647 character limit in this box).

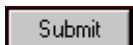
The screenshot shows a web browser window titled "NetSolutions - Configure and Customize". The window has a tabbed interface with the following tabs: "Account Information", "Organizational Information", "Site Customization Defaults", "Home Page", "Donor Profiling", "Additional Links", "Tell a Friend" (which is the active tab), and "Site Map/Links". The "Tell a Friend" tab is selected, and it displays a blue "e" icon followed by the text "Tell a Friend". Below this, there is a descriptive text: "Enter any descriptive text that you want to appear at the top of your NetSolutions 'Tell a Friend' page." A large text area with a scrollbar contains the following text: "Have you found some part of our website to be of value to yourself and your colleagues? Please share your find so that we can continue to grow and flourish. This form will send emails to the addresses of your choice." At the bottom of the window, there are two buttons: "Submit" and "Close".

Site Map/Links. On the Site Map/Links tab, we provide the code you can add to your Web page to add links to the various *NetSolutions* functions.

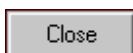


Buttons

Configure and Customize has two buttons.



The **Submit** button sends to Blackbaud all information entered on the **Configure and Customize** tabs. We use this information to design your NetSolutions Web pages.



The **Close** button closes the **Configure and Customize** link without submitting the information to Blackbaud. If you have not submitted your changes a screen appears to verify that you want to close without saving.

Configuring Your Web Pages

The configuration information you enter from the **Configure and Customize** link affects all *NetSolutions* Web pages we host in your name. This link is divided into seven tabs. The following procedures take you step-by-step through completing each tab.

Warning: Before you start working in *NetSolutions*, you must register as a *NetSolutions* user. For more information, see "Registering with NetSolutions" on page 1.

Multiple users can access different areas of *NetSolutions* simultaneously.

Account Information

The Account Information tab includes login identifications, passwords, and advance setup options.

► Entering your account information

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

Note: Although the **Login password** field entry is masked, if you have Supervisor rights, you can access the password by highlighting the field and hitting **F7** on your keyboard.

2. Click **Configure and Customize**. The NetSolutions - Configure and Customize screen appears displaying the Account Information tab.

Account Information
Enter your account and advocacy information on this page. This information is used to connect to the NetSolutions service and to the advocacy service.

Login ID: [Click here to test connection](#)

Login password: [Click here to view transaction statistics](#)

Serial number: [Click here for advanced options](#)

Merchant account:

Advocacy login: [Click here to test connection](#)

Advocacy password:

Enter the code to use when creating a new constituent record for an advocate:

Press F7 for table lookup

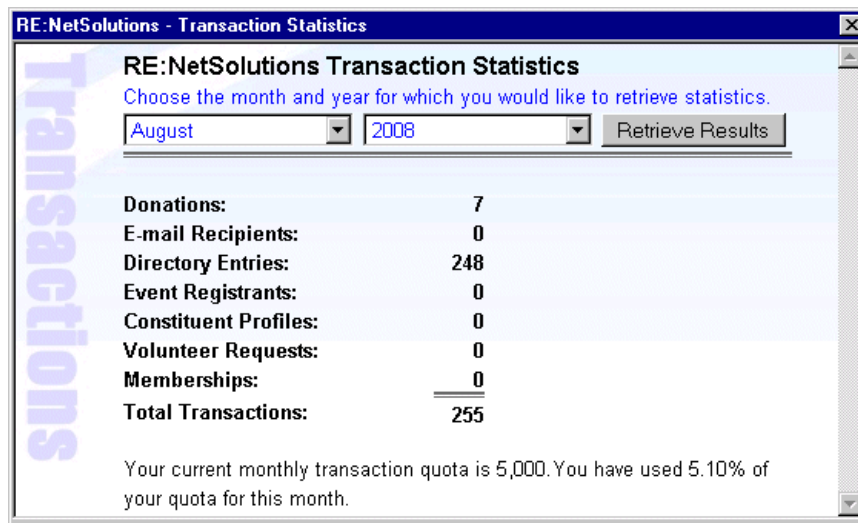
Note: Unless you change the default colors in **User Options**, required fields appear in cyan.

3. Enter the **Login ID** and **Login password** you established when you registered with *NetSolutions*. For more information, see "Registering with NetSolutions (The Raiser's Edge 7.85 or lower)" on page 3.
4. The **Serial number** field fills in automatically. You cannot change this number. Blackbaud registers you using the default number.
5. Select the type of **Merchant account** your organization uses to accept credit card information. You add merchant account information in **Business Rules** accessed through *Config*.
6. To confirm you can connect to Blackbaud's servers, click the **Click here to test connection** button. A screen appears confirming the connection.



7. Click **OK**.

8. To view a breakdown of your *NetSolutions* transactions, click the **Click here to view transaction statistics** button. The NetSolutions - Transaction Statistics screen appears.



RE:NetSolutions Transaction Statistics	
Choose the month and year for which you would like to retrieve statistics.	
August	2008
Retrieve Results	
Donations:	7
E-mail Recipients:	0
Directory Entries:	248
Event Registrants:	0
Constituent Profiles:	0
Volunteer Requests:	0
Memberships:	0
Total Transactions:	255
Your current monthly transaction quota is 5,000. You have used 5.10% of your quota for this month.	

9. Select the month and year for which to view transaction statistics. Click **Retrieve Results**. The screen displays the updated statistics.

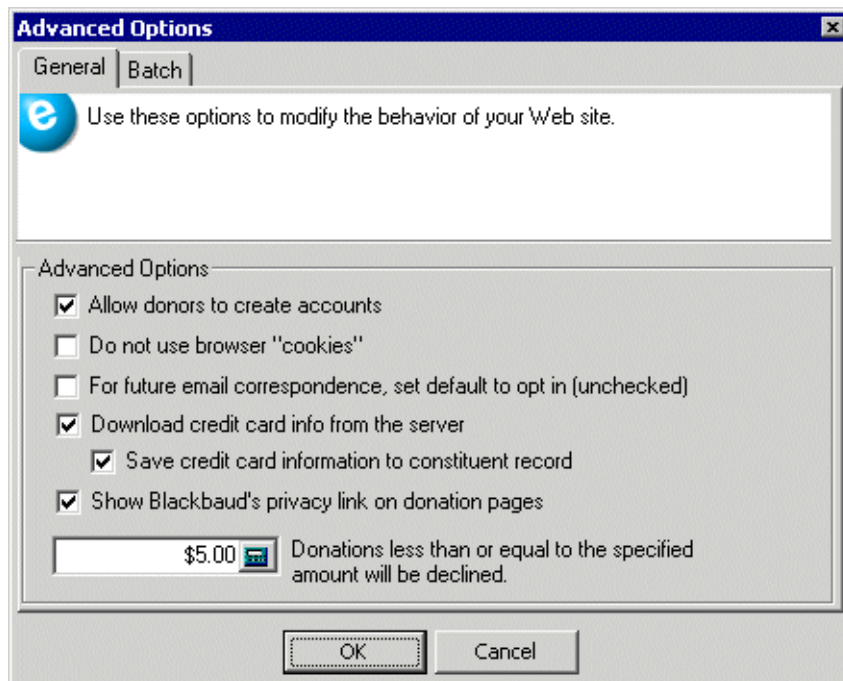
Note: For information about *Capwiz*, go to: www.capwiz.com.

10. To close the NetSolutions - Transactions Statistics screen and return to the NetSolutions - Configure and Customize screen, click the "X" in the upper right corner.

Note: For more information about advocacy, see the Actions chapter of the *Constituent Data Entry Guide*.

11. On the bottom half of the NetSolutions - Configure and Customize screen, to download advocacy action data to **The Raiser's Edge**, you must enter your **Advocacy login** and **Advocacy password**. This is the same information you enter to access your *Capwiz* account.
12. In the **Enter the code to use when creating a new constituent record for an advocate:** field, enter the constituent code you want used when importing new constituents into **The Raiser's Edge** from the **Import Advocacies** grid in the **Download Transactions** section of *NetSolutions*.

13. To include advanced security options, click **Click here for advanced options**. The Advanced Options screen appears displaying the General tab.



On the General tab of the Advanced Options screen, you have the following options:

- If you want to allow visitors to your *NetSolutions* Web pages to create accounts they can access using login names and passwords, mark the **Allow donors to create accounts** checkbox. If you mark this checkbox, visitors to your *NetSolutions* Web pages have the option of creating an account. They are not required to create an account.

If you mark this checkbox, a screen similar to the following appears when repeat visitors access your *NetSolutions* Web pages.

 The screenshot shows a web form titled "Wildlife Protection Association". At the top, it says "Please complete the following information. When you are finished, click Continue to enter your donation." Below this is a section titled "Registration Information" with a note "* Denotes Required Information". The form fields include:

- Title
- First Name
- Last Name*
- Address*
- City, State ZIP*
- Country* (set to United States)
- Phone
- Fax
- E-mail*

 Below these fields are two checkboxes:

- ☒ I wish to receive future e-mail correspondence.
- ☐ I prefer to make my donations anonymously.

 To the right of the registration form is an "Optional Login" section with the text: "Sign up for a free account that will enable you to easily make future donations and view previous Web transactions with Wildlife Protection Association." It includes fields for "Login ID*" and "Password*", a "Login" button, and a "Forgot my password" link. At the bottom of the registration section is an "Additional Information" section with the checkbox "Did you receive our mailing?" and a "Continue >" button.

Warning: Users of *Raiser's Edge 7.85* or earlier, credit card information is not downloaded from the NetSolutions server regardless of the Advanced Options selected.

- From the Advanced Options screen, mark the **Do not use browser cookies** checkbox and cookies are not added to the computers of visitors to your NetSolutions Web pages.
- When a donor completes your online Registration Information screen, a checkbox is included - **I wish to receive future email correspondence**. If you want this checkbox to default as unmarked ("no"), mark **For future email correspondence, set default to opt in (unchecked)**. If you want the online checkbox to default as marked ("yes"), do not mark **For future email correspondence, set default to opt in (unchecked)**.

Warning: If your organization accepts recurring credit card gifts, mark the **Download credit card information from the server** checkbox. If you do not, credit card numbers for recurring gifts are not downloaded. As a result, recurring gift payments are not generated and paid.

- If you want card information (truncated card number, card holder name, expiration date, and card token associating it with the card number saved to the Blackbaud Payment Service), mark **Download credit card information from the server**. If you mark this option, to save the credit card information to the constituent record when you download online information, mark **Save credit card information to constituent record**.

If you do not mark **Download credit card information from the server**, the card token name and expiration date remain on the NetSolutions server gift record and the actual card number remains on the Blackbaud Payment Service server.

- To include a link to Blackbaud's information privacy explanation, mark **Show Blackbaud's privacy link on donation pages**.
- You can enter a minimum acceptable online donation in the **Donations less than or equal to the specified amount will be declined** field. If the amount donated does not satisfy the amount entered in this field, the program voids the transaction.

14. On the Batch tab, you can select contact information you want added to your constituent records when you download information from your Web pages.

Advanced Options

General Batch

Use these options to indicate how data will be added to your constituent and organization records after downloading.

Batch Options

When adding constituent phones use this type: Home

When adding contact phones use this type: Business

When adding org phones use this type: Business

When adding constituent email addresses use this type: E-Mail

When adding contact email addresses use this type: E-Mail

OK Cancel

On the Batch tab of the Advanced Options screen, you have the following options:

- In the **When adding constituent phones use this type** field, select the phone type to assign phone numbers downloaded from your Web pages to individual constituent records in *The Raiser's Edge*. The type you assign appears next to the downloaded phone number in the **Type** column of the **Phones/Email/Links** grid on the Bio 1 tab of the individual constituent record.
 - In the **When adding contact phones use this type** field, select the phone type you want to assign phone numbers downloaded from your Web pages to contact constituent records in *The Raiser's Edge*. The type you assign appears next to the downloaded phone number in the **Type** column of the **Phones/Email/Links** grid on the General 1 tab of the organization relationship record.
 - In the **When adding org phones use this type** field, select the phone type you want to assign phone numbers downloaded from your Web pages to organization constituent records in *The Raiser's Edge*. The type you assign appears next to the downloaded phone number in the **Type** column of the **Phones/Email/Links** grid on the Org 1 tab of the constituent record.
 - In the **When adding constituent email addresses use this type** field, select the phone type you want to assign email addresses downloaded from your Web pages to individual constituent records in *The Raiser's Edge*. The type you assign appears next to the downloaded email address in the **Type** column of the **Phones/Email/Links** grid on the Bio 1 tab of the individual constituent record.
 - In the **When adding contact email addresses use this type** field, select the phone type you want to assign email addresses downloaded from your Web pages to contact constituent records in *The Raiser's Edge*. The type you assign appears next to the downloaded phone number in the **Type** column of the **Phones/Email/Links** grid on the General 1 tab of the organization relationship record.
15. When you complete the Advanced Options screen, click **OK**. You return to the Account Information tab on the NetSolutions - Configure and Customize screen.
 16. When you complete the Account Information tab, you can select another tab, click **Submit** to send the configuration information to Blackbaud, or click **Close** to return to the NetSolutions page without submitting the configuration information to Blackbaud. If you have not submitted your changes a screen will appear to verify that you want to close without saving.

Organizational Information

Organization information includes your organization's email address, a mission statement, a title for your Web page, and other general information.

► Entering your organization information

1. On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **Configure and Customize**. The NetSolutions - Configure and Customize screen appears displaying the Account Information tab.

3. Select the Organizational Information tab.

The screenshot shows the 'NetSolutions - Configure and Customize' window with the 'Organizational Information' tab selected. The window has a title bar and several tabs: 'Home Page', 'Donor Profiling', 'Additional Links', 'Tell a Friend', 'Site Map/Links', 'Account Information', 'Organizational Information' (selected), and 'Site Customization Defaults'. The 'Organizational Information' section contains the following fields:

- Title:** World Wildlife Association
- Mission:** Saving endangered animals.
- Page header:** Please Give!
- Email:** dir@wwa.org
- Home URL:** http://wwa.com
- Default fund:** 2008 Annual Fund
- Note:** You can specify more funds in the NetDonors wizard.

At the bottom of the window are 'Submit' and 'Close' buttons.

4. Enter the **Title** to appear on your donation page. The title appears at the top of the page.

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

5. Enter an **Email** address to appear on the Web site. This same email address is used in **NetMail**.
6. Enter a **Page header**. The page header appears under the title bar. If you include your mission statement, the page header appears under the mission statement. There is a 2,147,483,647 character limitation
7. Enter a **Default fund**. Any online donations not designated to a specific fund are credited to the **Default fund**.
8. You can include your organization's **Mission** statement. If you enter a mission statement, it appears at the top of your donation page. There is a 1,024 character limitation.

The preview shows the layout of the donation page. At the top is the title 'World Wildlife Association'. Below it is a welcome message: 'Welcome to our online donation page Ms. Frank Costanza. Follow the steps below to help World Wildlife Association accomplish its mission: Saving endangered animals. Please Give!'

9. Enter your organization's **Home URL** to provide a link from the Blackbaud hosted Web pages to your Home page.
10. When you complete the Organizational Information tab you can select another tab, click **Submit** to send the configuration information to Blackbaud, or click **Close** to return to the NetSolutions page without submitting the configuration information to Blackbaud. If you have not submitted your changes a screen will appear to verify that you want to close without saving.

Site Customization Defaults

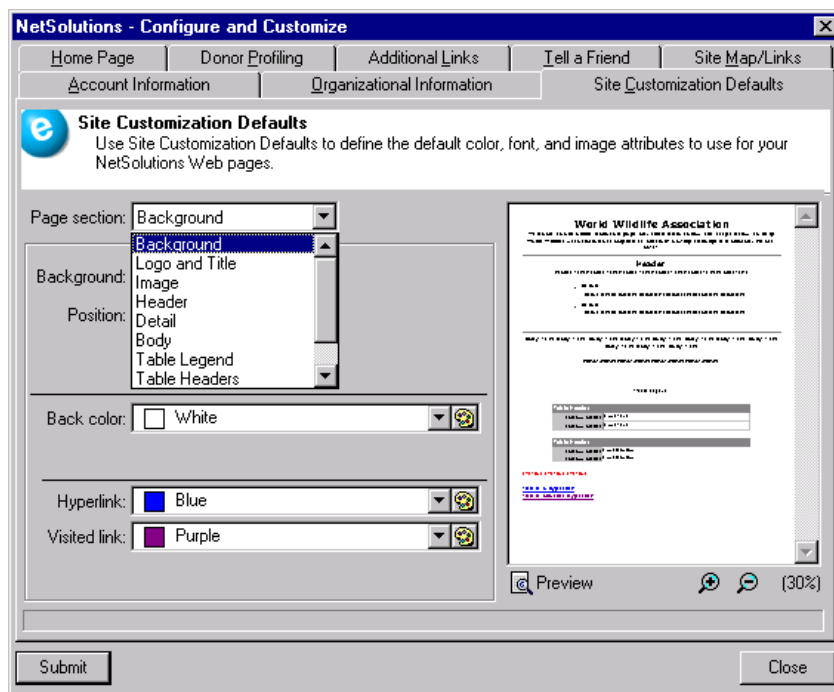
Site customization defaults are the colors, fonts, and images you want to use on your *NetSolutions* Web site. Using the Site Customization Defaults tab, you can personalize your entire *NetSolutions* Web site, using the following options: Background, Logo and Title, Image, Header, Detail, Body, Table Legend, Table Headers, Table Text, Error Text. Each option is explained in this section.

Customizing the Background of your Web Site

From the Site Customization Defaults tab, you can select background images and colors, hyperlink colors, and much more.

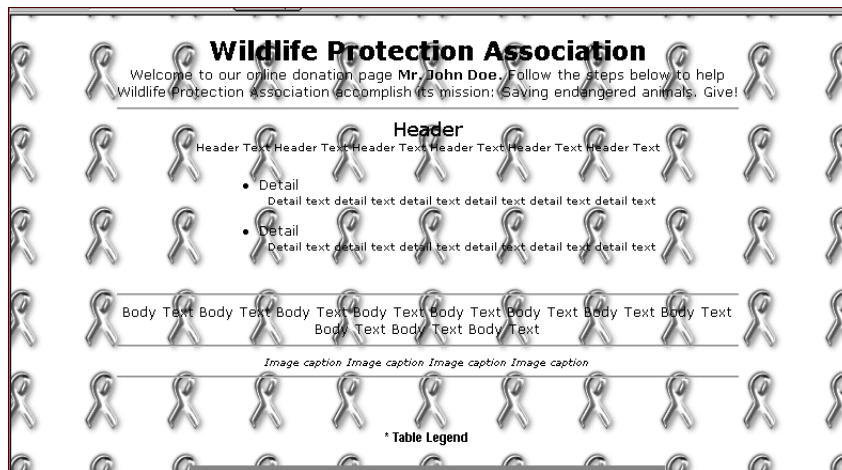
► Entering background site customization defaults

1. From the NetSolutions page, click the **Configure and Customize** link. For information about opening **Configure and Customize**, see “Accessing Configure and Customize” on page 14.
2. Select the Site Customization Defaults tab.
3. In the **Page section** field, select “Background”.



4. In the **Background** field, enter the background image you want to use. To map to the directory and folder in which the image is saved, click the ellipsis to access the Open screen and map to the image location.
5. In the **Position** field, select where on the Web page you want the image positioned. For example, if you want the image in the center of the page, select Center Center; if you want the image centered on the page, but at the bottom, select Center Bottom. The preview screen on the right side of the tab shows how the image will look on the page.

6. Mark **Tile image** if you want duplicates of the image to fill in the entire Web page, as shown in the following picture.



7. Mark **Watermark** and the text on the Web page scrolls to the image. The image is then always visible on the page.

Note: The fields available on the Site Customization Defaults tab change, based on your selection in the **Page section** field.

8. In the **Back color** field, select the background color to use on your Web page.
9. In the **Hyperlink** field, select the color in which you want hyperlinks on the Web page displayed.
10. In the **Visited Link** field, select the color in which you want links visited by your users to display.
11. A preview screen appears on the right side of the tab shows how the selection you made will appear on your Web page. Click **Preview** to visit a full-size sample.
12. Select another Page section to define. Or, if you completed this tab, you can select another tab, click **Submit** to send the configuration information to Blackbaud, or click **Close** to return to the NetSolutions page. If you have not submitted your changes, a screen appears to verify that you want to close without saving.

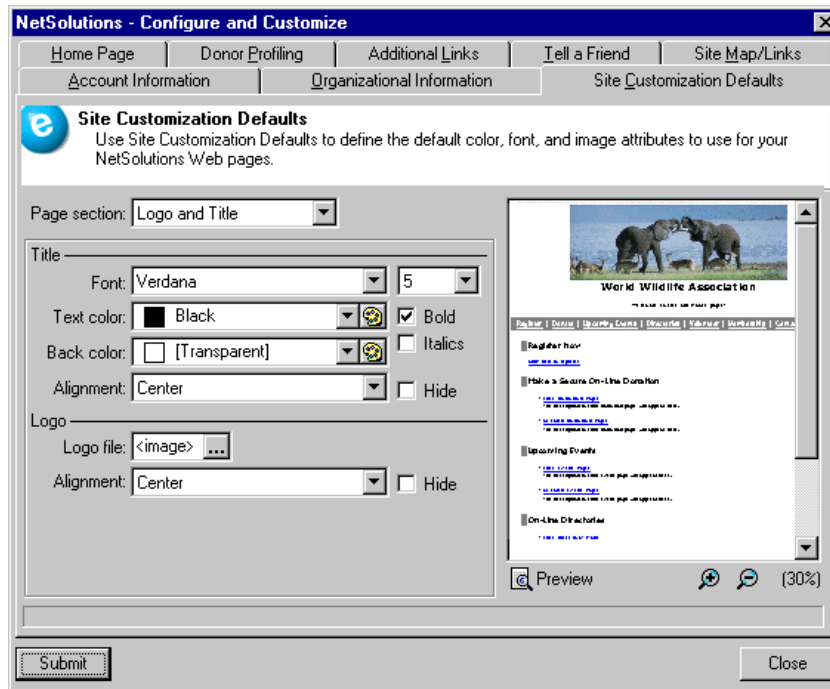
Customizing the Logo and Title of your Web Site

From the Site Customization Defaults tab, you can select your Web page title's font, text color, background color, logo, alignment, and more.

► Entering logo and title site customization defaults

1. From the NetSolutions page, click the **Configure and Customize** link. For information about opening **Configure and Customize**, see "Accessing Configure and Customize" on page 14.
2. Select the Site Customization Defaults tab.

3. In the **Page section** field, select “Logo and Title”.



4. In the **Title** frame, design the title for your Web page.
- Select the **Font** to use in your title and enter the font size.
 - In the **Text color** field, select the color to use for the title text.
 - In the **Back color** field, select a background color to use behind your title.
 - In the **Alignment** field, select where on the Web page you want the title aligned: Left, Center, or Right.
 - Mark **Bold** to bold the title text; mark **Italics** to italicize the title text; mark **Hide** to hide the title.
5. In the **Logo** frame, you can select to include a logo in your title.
- In the **Logo file** field, click the ellipsis to access the Open screen. Locate the directory and file in which your logo image is saved and select the image.
 - In the **Alignment** field, select where on the Web page you want the logo aligned: Left, Center, or Right.
6. A preview screen on the right side of the tab, shows how the selection you made will appear on your Web page. Click **Preview** to visit a full-size sample.
7. Select another Page section to define. Or, if you completed this tab, you can select another tab, click **Submit** to send the configuration information to Blackbaud, or click **Close** to return to the NetSolutions page. If you have not submitted your changes a screen appears to verify that you want to close without saving.

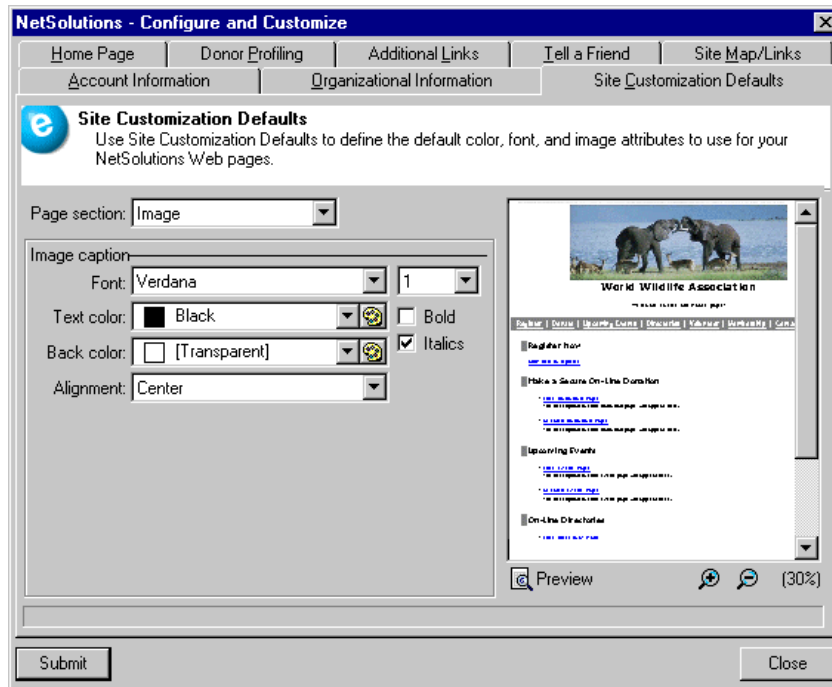
Customizing the Image Caption of your Web Site

From the Site Customization Defaults tab, you can customize the Web site image caption, selecting fonts, text color, background color, and more.

► Entering image caption site customization defaults

1. From the NetSolutions page, click the **Configure and Customize** link. For information about opening **Configure and Customize**, see “Accessing Configure and Customize” on page 14.
2. Select the Site Customization Defaults tab.

3. In the **Page section** field, select “Image”.



4. In the **Image caption** frame, design the caption used for your Web page image.
- Select the **Font** to use in your caption and enter the font size.
 - In the **Text color** field, select the color to use for the caption.
 - In the **Back color** field, select a background color you want to use behind your caption.
 - In the **Alignment** field, select where on the Web page you want the caption aligned: Left, Center, or Right.
 - Mark **Bold** to bold the caption text; mark **Italics** to italicize the caption text.
5. A preview screen on the right side of the tab shows you how the selection you made will appear on your Web page. Click **Preview** to visit a full-size sample.
6. Select another Page section to define. Or, if you completed this tab, you can select another tab, click **Submit** to send the configuration information to Blackbaud, or click **Close** to return to the NetSolutions page. If you have not submitted your changes a screen will appear to verify that you want to close without saving.

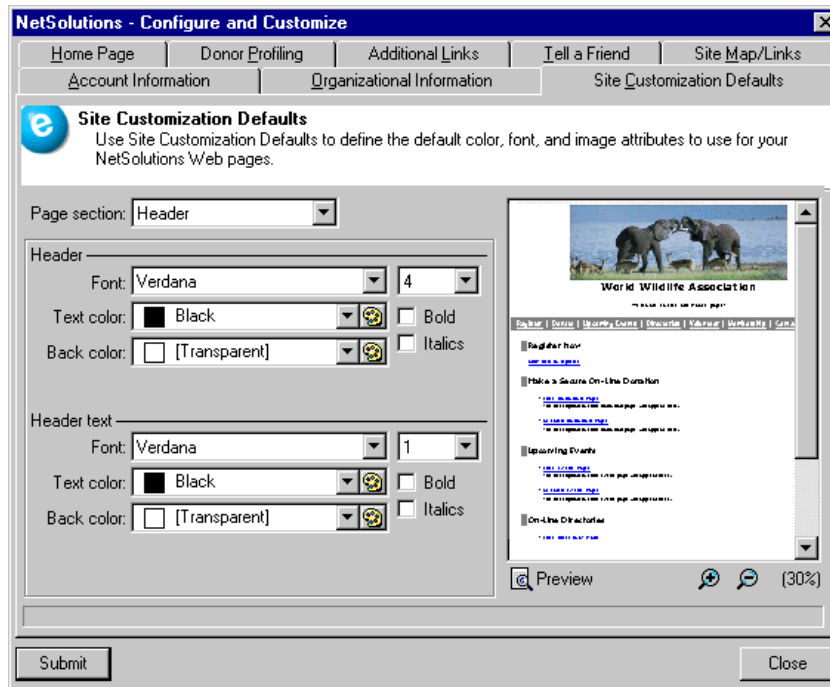
Customizing the Header of your Web Site

From the Site Customization Defaults tab, you can customize the header used on your Web page, selecting fonts, text color, background color, and more.

► Entering header site customization defaults

1. From the NetSolutions page, open the **Configure and Customize** link. For information about opening **Configure and Customize**, see “Accessing Configure and Customize” on page 14.
2. Select the Site Customization Defaults tab.

3. In the **Page section** field, select “Header”.



4. In the **Header** frame, design the header for your Web page.
- Select the **Font** to use in your header and enter the font size.
 - In the **Text color** field, select the color to use for the header.
 - In the **Back color** field, select a background color to use behind your header.
 - Mark **Bold**, to bold the header; mark **Italics** to italicize the header.
5. In the **Header text** frame, design the text to appear under your header on your Web page.
- Select the **Font** you want to use in your header text and enter the font size.
 - In the **Text color** field, select the color to use for the header text.
 - In the **Back color** field, select a background color to use behind your header text.
 - Mark **Bold** to bold the header text; mark **Italics** to italicize the header text.
6. A preview screen on the right side of the tab shows how the selection you made will appear on your Web page. Click **Preview** to visit a full-size sample.
7. Select another Page section to define. Or, if you completed this tab, you can select another tab, click **Submit** to send the configuration information to Blackbaud, or click **Close** to return to the NetSolutions page. If you have not submitted your changes a screen appears to verify that you want to close without saving.

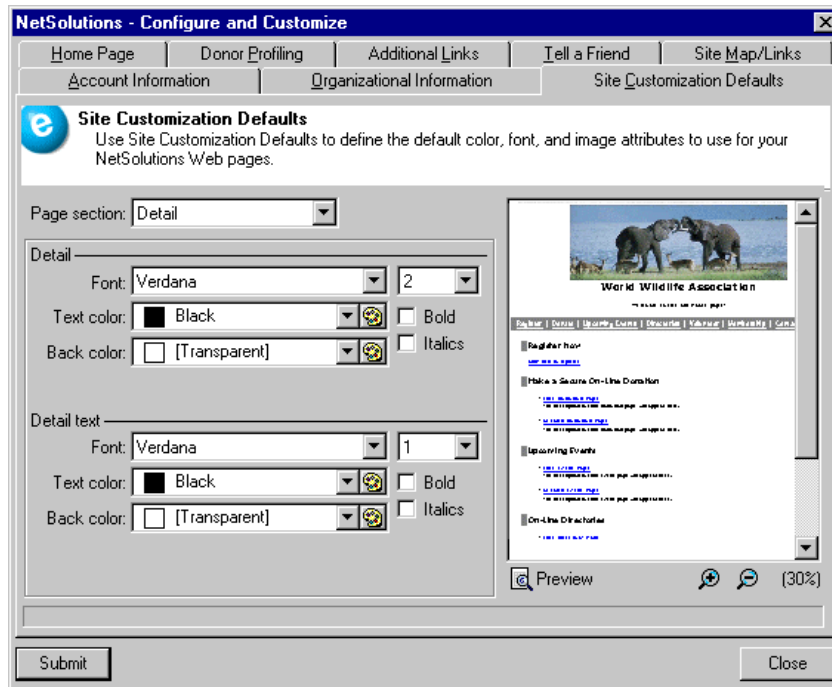
Customizing the Detail Information of your Web Site

From the Site Customization Defaults tab, you can determine how the detail information explaining your organization appears on your Web page. You can select fonts, text color, background color, and more.

► Entering detail site customization defaults

1. From the NetSolutions page, click the **Configure and Customize** link. For information about opening **Configure and Customize**, see “Accessing Configure and Customize” on page 14.
2. Select the Site Customization Defaults tab.

3. In the **Page section** field, select “Detail”.



4. In the **Detail** frame, design the detail header for your Web page.
 - Select the **Font** to use in your detail header and enter the font size.
 - In the **Text color** field, select the color to use for the detail header.
 - In the **Back color** field, select a background color to use behind your detail header.
 - Mark **Bold** to bold the detail header; mark **Italics** to italicize the detail header.
5. In the **Detail text** frame, design the text to appear under your detail header on your Web page.
 - Select the **Font** to use in your detail text and enter the font size.
 - In the **Text color** field, select the color to use for the detail text.
 - In the **Back color** field, select a background color to use behind your detail text.
 - Mark **Bold** to bold the detail text; mark **Italics** to italicize the detail text.
6. A preview screen on the right side of the tab shows you how the selection you made will appear on your Web page. Click **Preview** to visit a full-size sample.
7. Select another Page section to define. Or, if you completed this tab, you can select another tab, click **Submit** to send the configuration information to Blackbaud, or click **Close** to return to the NetSolutions page. If you have not submitted your changes a screen appears to verify that you want to close without saving.

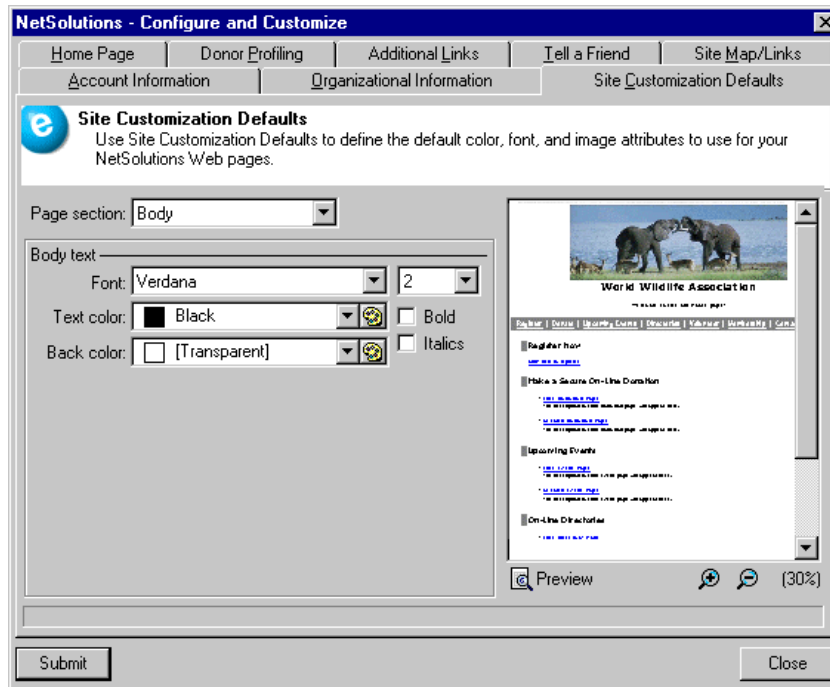
Customizing the Body Text of your Web Site

From the Site Customization Defaults tab, you can format the body text used on your Web page. You can select fonts, text color, background color, and more.

► Entering body text site customization defaults

1. From the NetSolutions page, click the **Configure and Customize** link. For information about opening **Configure and Customize**, see “Accessing Configure and Customize” on page 14.
2. Select the Site Customization Defaults tab.

3. In the **Page section** field, select “Body”.



4. In the **Body text** frame, design appearance of the body text for your Web page.
- Select the **Font** to use in your body text and enter the font size.
 - In the **Text color** field, select the color to use for the body text.
 - In the **Back color** field, select a background color to use behind your body text.
 - Mark **Bold** to bold the body text; mark **Italics** to italicize the body text.
5. A preview screen on the right side of the tab shows you how the selection will appear on your Web page. Click **Preview** to visit a full-size sample.
6. Select another Page section to define. Or, if you completed this tab, you can select another tab, click **Submit** to send the configuration information to Blackbaud, or click **Close** to return to the NetSolutions page. If you have not submitted your changes a screen appears to verify that you want to close without saving.

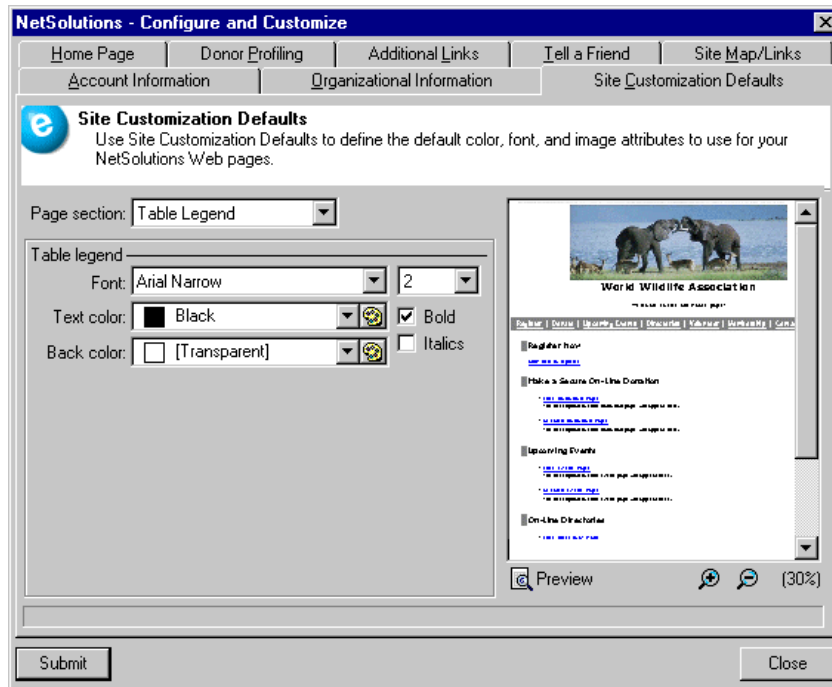
Customizing the Table Legends of your Web Site

From the Site Customization Defaults tab, you can format table legends you include on your Web. You can select fonts, text color, background color, and more.

► Entering table legend site customization defaults

1. From the NetSolutions page, click the **Configure and Customize** link. For information about opening **Configure and Customize**, see “Accessing Configure and Customize” on page 14.
2. Select the Site Customization Defaults tab.

3. In the **Page section** field, select “Table Legend”.



4. In the **Table legend** frame, define the table legends for your Web page.
- Select the **Font** to use in your table legend and enter the font size.
 - In the **Text color** field, select the color to use for the table legend.
 - In the **Back color** field, select a background color to use behind your table legend.
 - Mark **Bold** to bold the table legend text; mark **Italics** to italicize the table legend text.
5. Select another Page section to define. Or, if you completed this tab, you can select another tab, click **Submit** to send the configuration information to Blackbaud, or click **Close** to return to the NetSolutions page. If you have not submitted your changes a screen appears to verify that you want to close without saving.

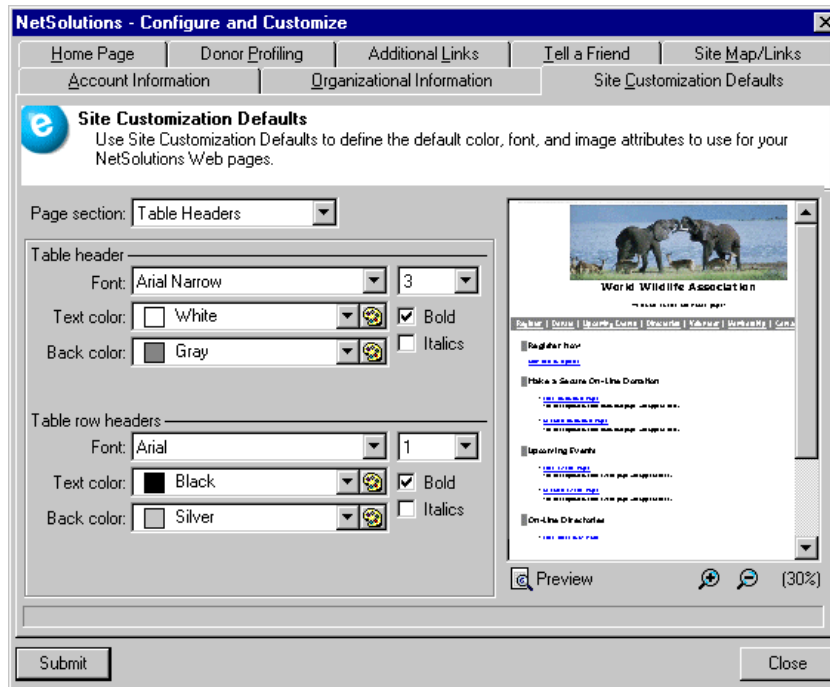
Customizing the Table Headers of your Web Site

From the Site Customization Defaults tab, you can format table headers you include on your Web page. You can select fonts, text color, background color, and more.

► Entering table header site customization defaults

1. From the NetSolutions page, click the **Configure and Customize** link. For information about opening **Configure and Customize**, see “Accessing Configure and Customize” on page 14.
2. Select the Site Customization Defaults tab.

3. In the **Page section** field, select “Table Headers”.



4. In the **Table header** frame, design the table headers for your Web page.
- Select the **Font** to use in your table header and enter the font size.
 - In the **Text color** field, select the color to use for the table header.
 - In the **Back color** field, select a background color to use behind your table header.
 - Mark **Bold** to bold the table header; mark **Italics** to italicize the table header.
5. In the **Table row headers** frame, design your table row header text.
- Select the **Font** to use in your table row header text and enter the font size.
 - In the **Text color** field, select the color to use for the table row header text.
 - In the **Back color** field, select a background color to use behind your table row header text.
 - Mark **Bold** to bold the table row header text; mark **Italics** to italicize the table row header text.
6. A preview screen on the right side of the tab shows you how the selection you made will appear on your Web page. Click **Preview** to visit a full-size sample.
7. Select another Page section to define. Or, if you completed this tab, you can select another tab, click **Submit** to send the configuration information to Blackbaud, or click **Close** to return to the NetSolutions page. If you have not submitted your changes a screen appears to verify that you want to close without saving.

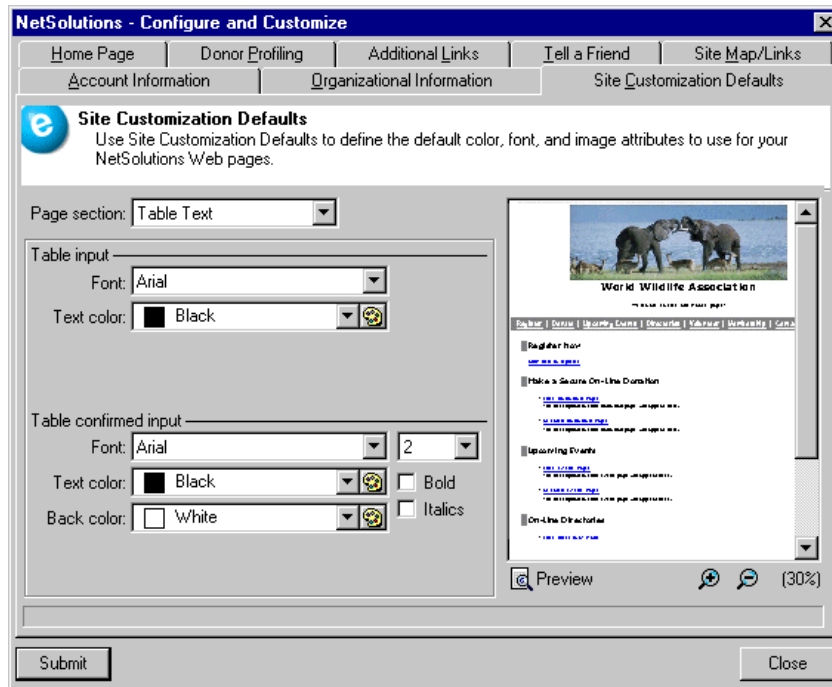
Customizing the Table Text of your Web Page

From the Site Customization Defaults tab, you can determine how any text entered into tables included on your Web site appears. You can select fonts, text color, background color, and more.

► Entering table text site customization defaults

1. From the NetSolutions page, click the **Configure and Customize** link. For information about opening **Configure and Customize**, see “Accessing Configure and Customize” on page 14.
2. Select the Site Customization Defaults tab.

3. In the **Page section** field, select “Table text”.



4. In the **Table input** frame, select how you want text entered into tables included on your Web page to appear.
 - Select the **Font** to use for your table input text and enter the font size.
 - In the **Text color** field, select the color to use for the table input text.
5. In the **Table confirmed input** frame, select how you want confirmed text entered into tables included on your Web page to appear.
 - Select the **Font** to use for your table confirmed input text and enter the font size.
 - In the **Text color** field, select the color to use for the table confirmed input text.
 - In the **Back color** field, select a background color to use behind your table confirmed input text.
 - Mark **Bold** to bold the table confirmed input text; mark **Italics** to italicize the table confirmed input text.
6. A preview screen on the right side of the tab shows you how the selection you made will appear on your Web page. Click **Preview** to visit a full-size sample.
7. Select another Page section to define. Or, if you completed this tab, you can select another tab, click **Submit** to send the configuration information to Blackbaud, or click **Close** to return to the NetSolutions page. If you have not submitted your changes a screen appears to verify that you want to close without saving.

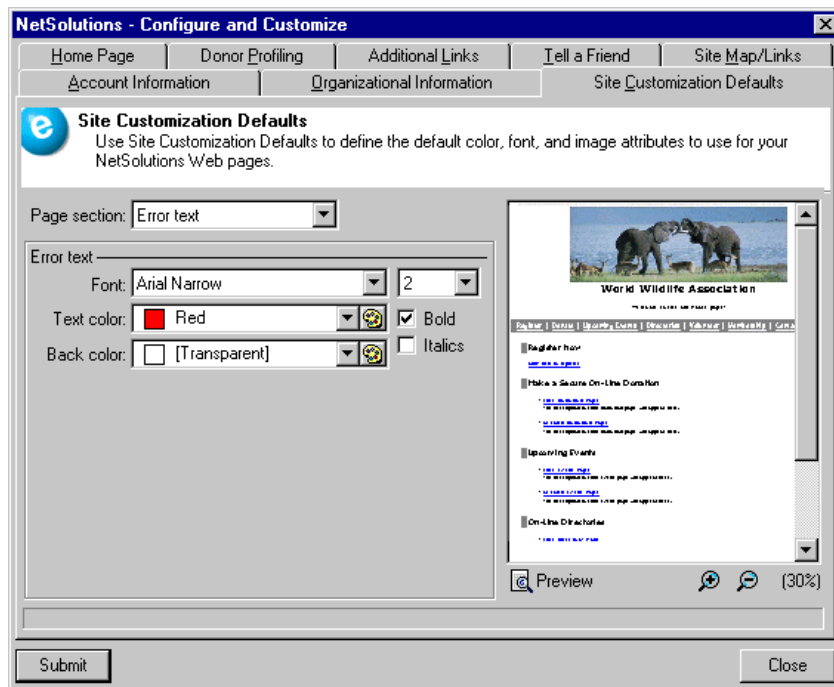
Customizing the Error Text of your Web Page

From the Site Customization Defaults tab, you can determine the appearance of any error messages users may receive while working on your Web page. You can select fonts, text color, background color, and more.

► Entering error message site customization defaults

1. From the NetSolutions page, click the **Configure and Customize** link. For information about opening **Configure and Customize**, see “Accessing Configure and Customize” on page 14.
2. Select the Site Customization Defaults tab.

3. In the **Page section** field, select “Error text”.



4. In the **Error text** frame, define the error text you want to use for your Web page.
 - Select the **Font** to use in your error text and enter the font size.
 - In the **Text color** field, select the color to use for the error text.
 - In the **Back color** field, select a background color to use behind your error text.
 - Mark **Bold** to bold the error text; mark **Italics** to italicize the error text.
5. A preview screen on the right side of the tab shows you how the selection you made will appear on your Web page. Click **Preview** to visit a full-size sample.
6. Select another Page section to define. Or, if you completed this tab, you can select another tab, click **Submit** to send the configuration information to Blackbaud, or click **Close** to return to the NetSolutions page. If you have not submitted your changes a screen appears to verify that you want to close without saving.

Home Page

The *NetSolutions* Home page serves as a navigation center for your Web users. Blackbaud provides you with this default Home page, which includes all previously defined *NetSolutions* links. For example, if you have a *NetSolutions* page for **NetDonors** and **NetMail**, you can include links to both pages on the *NetSolutions* Home page.

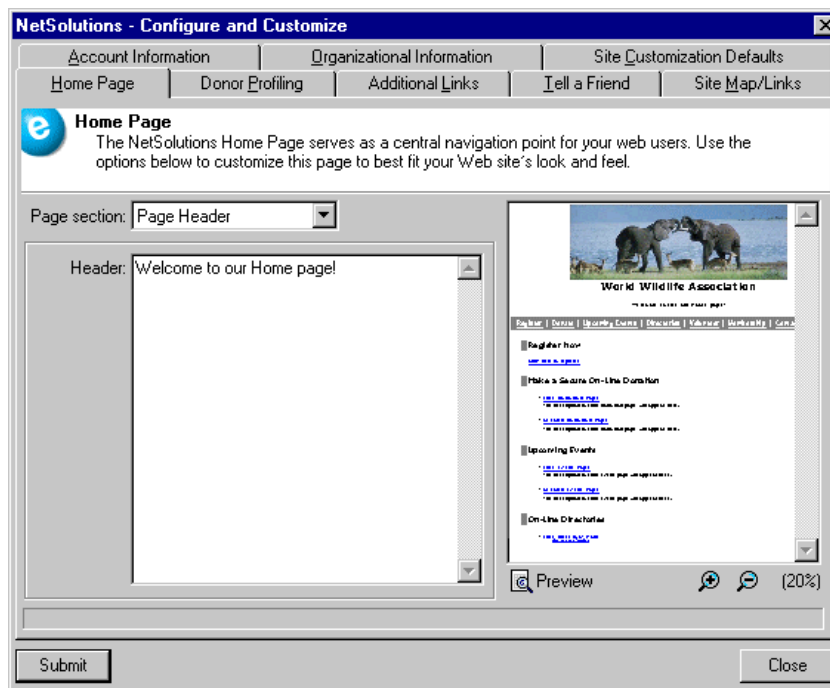
Using the Home Page tab available in **Configure and Customize**, you can customize the *NetSolutions* Home page, making it look more like your organization's Web site.

► Entering Home page information

1. On the Raiser's Edge bar, select *NetSolutions*. The *NetSolutions* page appears.
2. Click **Configure and Customize**. The *NetSolutions* - Configure and Customize screen appears displaying the Account Information tab.

Note: If you want to use your Web site's existing Home page to host the *NetSolutions* links, you can add these links using the Site Map/Links tab.

3. Select the Home Page tab. Blackbaud automatically generates a default Home page for your **NetSolutions** links. The fields on this tab allow you to customize the Home page to match the design of your Web site.
4. In the **Page section** field, select the section of the Web page you are formatting. You can define formats for the following: Page Header, Registration, Donations, Events, Directories, Volunteer, Membership, and Contact.
5. If, in the **Page section** field, you select "Page Header", in the **Header** box, enter what you want to appear at the top of your Home page.



A preview screen on the right side of the tab shows you how your Home page will look based on your selections on this tab. The information entered in the preceding example appears as follows on your Home page.



6. If, in the **Page section** field, you select “Registration”, you can enter information guiding visitors from your Home page to the online constituent registration page.

The screenshot shows the 'NetSolutions - Configure and Customize' window. The 'Home Page' tab is selected. The 'Page section' dropdown is set to 'Registration'. The 'Header' field contains 'Register Now'. The 'Detail' field contains 'Registering now will save you time in the future.' The 'Link text' field contains 'Click here to register'. A preview of the resulting page is shown on the right, featuring a header image of two elephants and the text 'World Wildlife Association'. The preview includes links for 'Register now', 'Habitat's Science On-Line Duration', 'Upcoming Events', and 'On-Line Director'. The window has a 'Submit' button and a 'Close' button.

In the **Header** field, enter what you want to appear at the top of the prospect registration section of your Home page.

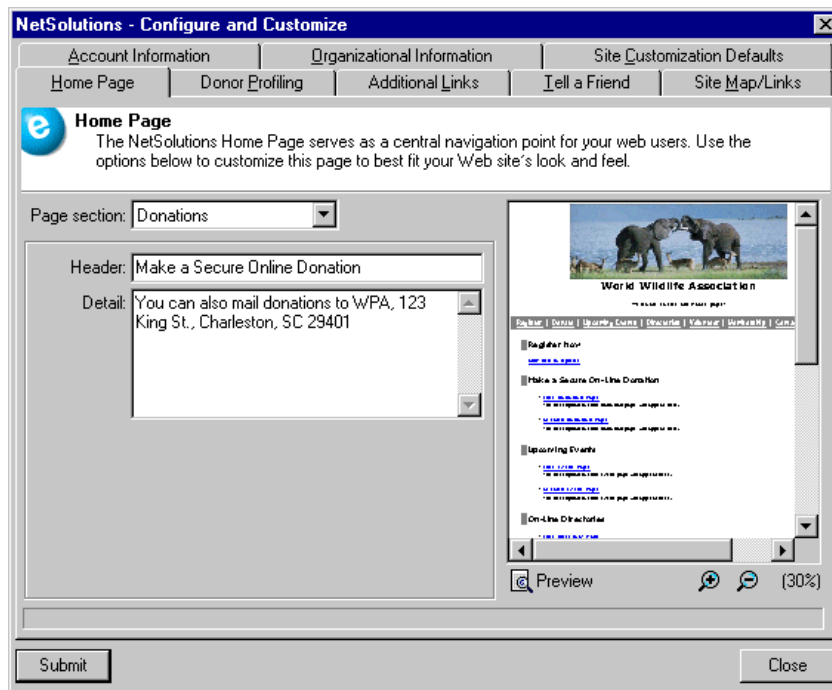
In the **Detail** box, you can enter information about prospect registration.

In the **Link text** field, enter what you want the link to the prospect registration page to say.

A preview screen on the right side of the tab shows you how your Home page will look based on your selections on this tab. The information entered in the preceding example appears as follows on your Home page.

The preview shows a box with a header 'Register Now' and a paragraph 'Registering now will save you time in the future. [Click here to register](#)'.

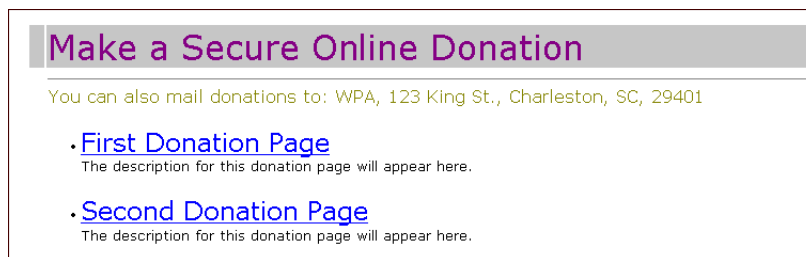
7. If, in the **Page section** field, you select “Donations”, you can enter information guiding visitors from your *NetSolutions* Home page to online donation information.



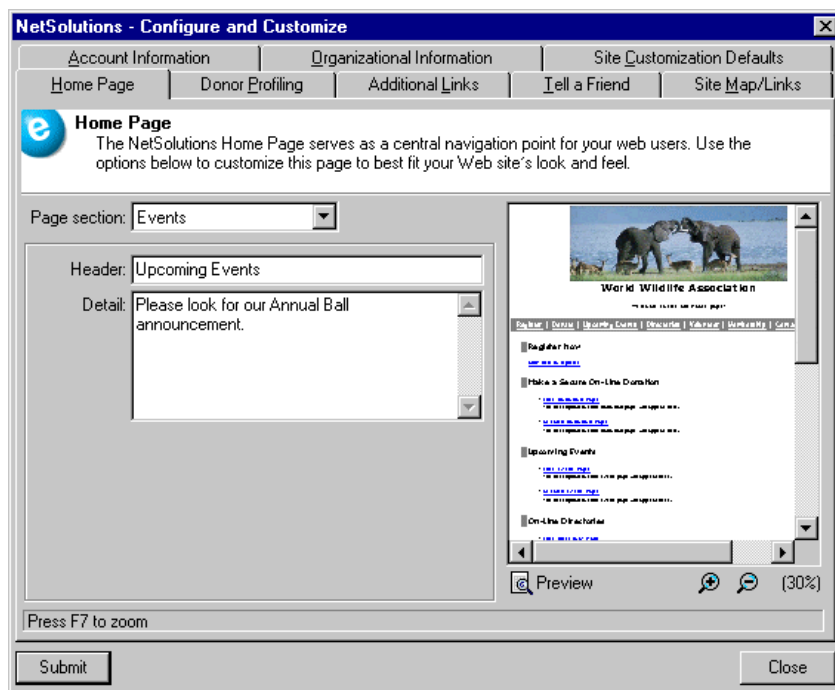
In the **Header** field, enter what you want to appear at the top of the donation section on your *NetSolutions* Home page.

In the **Detail** box, you can enter additional donation information.

A preview screen on the right side of the tab shows you how your *NetSolutions* Home page will look based on your selections on this tab. The information entered in the preceding example appears as follows on your *NetSolutions* Home page.



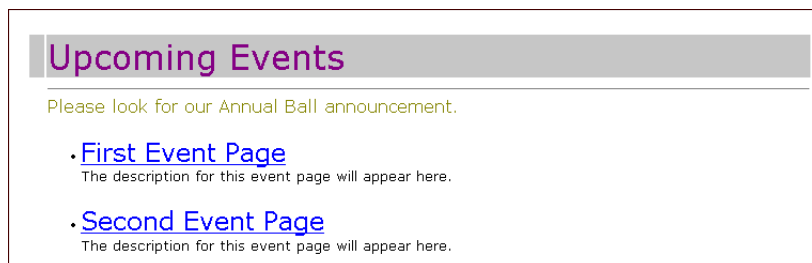
8. If, in the **Page section** field, you select “Events”, you can enter information guiding visitors from your *NetSolutions* Home page to your online events page.



In the **Header** field, enter what you want to appear at the top of the events section on your *NetSolutions* Home page.

In the **Detail** box, you can enter additional event information.

A preview screen on the right side of the tab shows you how your *NetSolutions* Home page will look based on your selections on this tab. The information entered in the preceding example appears as follows on your *NetSolutions* Home page.



9. If in the **Page section** field, you select “Directories”, this information guides visitors from your *NetSolutions* Home page to your online directories.

NetSolutions - Configure and Customize

Account Information | Organizational Information | Site Customization Defaults

Home Page | Donor Profiling | Additional Links | Tell a Friend | Site Map/Links

Home Page
The NetSolutions Home Page serves as a central navigation point for your web users. Use the options below to customize this page to best fit your Web site's look and feel.

Page section: Directories

Header: Online Directories

Detail: We update our directories every two months.

Preview (30%)

Press F7 to zoom

Submit Close

In the **Header** field, enter what you want to appear at the beginning of the directories section.

In the **Detail** box, you can enter additional information about your online directories.

A preview screen on the right side of the tab shows you how your *NetSolutions* Home page will look based on your selections on this tab. The information entered in the preceding example appears as follows on your *NetSolutions* Home page.

Online Directories

We update our directories every two months.

- [First Directory Page](#)
The description for this directory page will appear here.
- [Second Directory Page](#)
The description for this directory page will appear here.

10. If in the **Page section** field, you select “Volunteer”, you can enter on your *NetSolutions* Home page information about online volunteer opportunities and provide links to additional volunteer information.

The screenshot shows the "NetSolutions - Configure and Customize" window. The "Home Page" tab is selected. Under "Page section", "Volunteer" is chosen. The "Header" field contains "Volunteer Opportunities". The "Detail" field contains "We are currently looking for data entry help.". The "Link text" field contains "Click here to be contacted for future volunteer op". On the right, a preview of the website shows the configured content, including a header image of elephants and a list of links.

In the **Header** field, enter what you want to appear at the beginning of the volunteer section of your *NetSolutions* Home page.

In the **Detail** box, you can enter additional information about your online volunteer opportunities.

In the **Link text** field, enter the text you want to appear as a link to the email address.

A preview screen on the right side of the tab shows you how your *NetSolutions* Home page will look based on your selections on this tab. The information entered in the preceding example appears as follows on your *NetSolutions* Home page.

The preview shows the "Volunteer Opportunities" section. It includes the header "Volunteer Opportunities", the detail text "We are currently looking for data entry help.", and a list of links: "Click here to be contacted for future volunteer opportunities", "First Volunteer Page", and "Second Volunteer Page". Each link is followed by a placeholder text: "The description for this volunteer page will appear here."

11. If in the **Page section** field, you select “Membership”, you can enter on your *NetSolutions* Home page information about online membership opportunities and provide links to additional membership information.

The screenshot shows the 'NetSolutions - Configure and Customize' window. The 'Home Page' tab is selected. Under 'Page section', 'Membership' is chosen. The 'Header' field contains 'Membership Opportunities' and the 'Detail' field contains 'Please consider a gift of membership.' A preview window on the right shows how the page will look, featuring a header image of two elephants, a 'World Wildlife Association' logo, and a list of links under 'Membership Opportunities'.

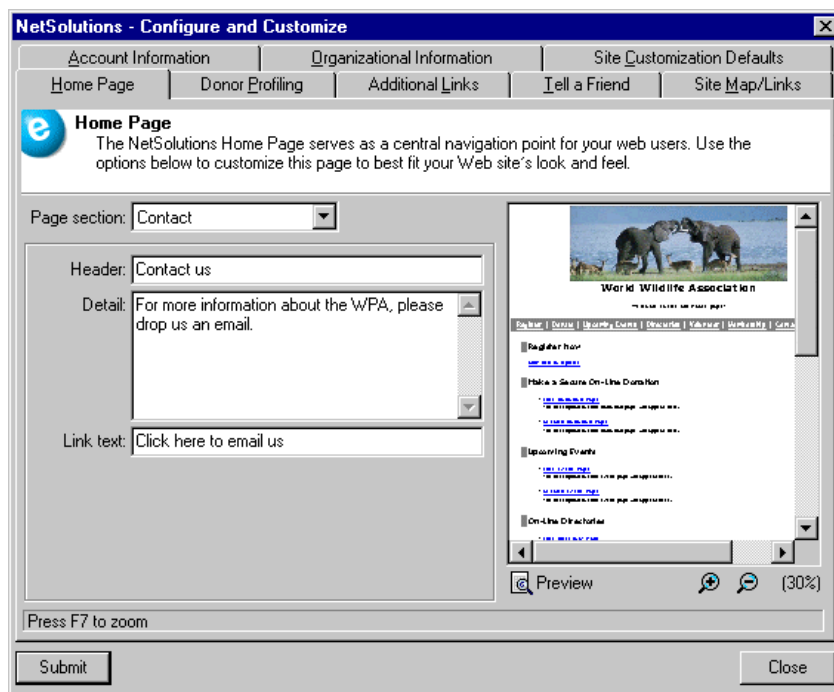
In the **Header** field, enter what you want to appear at the beginning of the membership section of your *NetSolutions* Home page.

In the **Detail** box, you can enter additional information about your online memberships.

A preview screen on the right side of the tab shows you how your *NetSolutions* Home page will look based on your selections. The information entered in the preceding example appears as follows on your *NetSolutions* Home page.

The preview shows the 'Membership Opportunities' section of the NetSolutions Home page. It features a header with the text 'Membership Opportunities' and a sub-header 'Please consider a gift of membership'. Below this, there are two links: 'First Membership Page' and 'Second Membership Page', each followed by the text 'The description for this membership page will appear here.'

12. If in the **Page section** field, you select “Contact”, you can enter contact email addresses on your *NetSolutions* Home page.

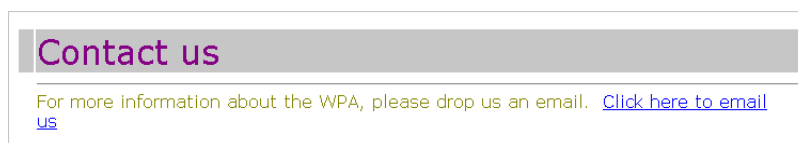


In the **Header** field, enter what you want to appear at the beginning of the contact section on your *NetSolutions* Home page.

In the **Detail** box, you can enter additional contact information.

In the **Link text** field, enter the text to appear as a link to your email address.

A preview screen on the right side of the tab shows you how your *NetSolutions* Home page will look based on your selections. The information entered in the preceding example appears as follows on your *NetSolutions* Home page.



13. When you complete this tab, select another tab, click **Submit** to send the configuration information to Blackbaud, or click **Close** to return to the *NetSolutions* page without submitting the configuration information to Blackbaud.

Donor Profiling

Donor profiling allows you to include questions on your *NetSolutions* Web page to gather additional information from donors. These questions help you segment, target, and cultivate your constituency.

► Entering donor profiling information

1. On the Raiser's Edge bar, click **NetSolutions**. The *NetSolutions* page appears.
2. Click **Configure and Customize**. The *NetSolutions* - Configure and Customize screen appears displaying the Account Information tab.

3. Select the Donor Profiling tab.

The screenshot shows a web application window titled "NetSolutions - Configure and Customize". It has several tabs: "Account Information", "Organizational Information", "Site Customization Defaults", "Home Page", "Donor Profiling" (selected), "Additional Links", "Tell a Friend", and "Site Map/Links". The "Donor Profiling" tab contains a section with a blue 'e' icon and the text: "Donor Profiling. Use Donor Profiling questions to gather additional information from your Web users that will help segment, target, and cultivate your constituency. These questions will appear at the end of any registration page in NetSolutions that does not have specific questions specified." Below this is a table with two columns: "Profiling Question" and "Attribute to Use". The first row contains the question "Did you receive our mailing?" and the attribute "Mailing". There is a small edit icon (pencil) to the left of the question. Below the table is a large empty text area. At the bottom of the window are "Submit" and "Close" buttons.

Profiling Question	Attribute to Use
Did you receive our mailing?	Mailing

On this tab, you can enter questions to appear on your NetSolutions Registration page. The questions can help you better understand your donors.

4. For example, in the **Donor Profiling Question** column, you can ask the question "Did you receive our mailing?". This question then appears at the end of the donor registration page with a **Yes** and **No** option.

Note: Only yes/no constituent attributes appear in the **Attribute to Use** column. You can add new attributes on the fly.

5. In the **Attribute to Use** column, you must assign the question to a constituent attribute in your database. In the example above, if the registrant selects **Yes** for the **Did you get our mailing?** option on the donation page, the information appears on the Attributes tab of the constituent record.

On the constituent record, "Mailing" appears in the **Category** column and "Yes" appears in the **Description** column.

6. When you complete this tab, select another tab, click **Submit** to send the configuration information to Blackbaud, or click **Close** to return to the NetSolutions page without submitting the configuration information to Blackbaud.

Additional Links

From the Additional Links tab, you can add links to related Web sites. For example, an animal protection organization may want to include a link on its online registration page taking visitors to an animal adoption Web site. This link can be added using the Additional Links tab.

► Adding links to your online registration screen

1. On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **Configure and Customize**. The NetSolutions - Configure and Customize screen appears displaying the Account Information tab.

3. Select the Additional Links tab.

The screenshot shows a web browser window titled "NetSolutions - Configure and Customize". The window has several tabs: "Account Information", "Organizational Information", "Site Customization Defaults", "Home Page", "Donor Profiling", "Additional Links" (which is selected), "Tell a Friend", and "Site Map/Links". The "Additional Links" tab contains a section with a blue 'e' icon and the text "Additional Links" and "Add links to your pages to point your donors to privacy or other information they need to know." Below this is a table with three columns: "Image", "Caption", and "URL". The first row contains the text "<image>", "Animals you can adopt.", and "http://adoptanimals.com". Below the table is a large empty text area. At the bottom of the window are "Submit" and "Close" buttons.

Image	Caption	URL
<image>	Animals you can adopt.	http://adoptanimals.com

On this tab, you can add links to your online registration page, taking visitors to other Web sites.

4. In the **Image** column, you must map to an image to use as the hyperlink on your registration page. (Images are set to resize to 54px × 62px. If they don't fit that ratio, they will squish to fit.)
5. In the **Caption** column, enter the text you want visitors to see when they hover their mouse over the hyperlink image.
6. In the **URL** column, enter the address of the Web site to which you are adding a link. The column accepts the URL with or without the <http://>.
7. When you complete this tab, select another tab, click **Submit** to send the configuration information to Blackbaud, or click **Close** to return to the NetSolutions page without submitting the configuration information to Blackbaud.

Tell a Friend

NetSolutions provides a **Tell a Friend** link on your Web pages. On the Tell a Friend tab, you can enter the text you want to appear when visitors to your site click the **Tell a Friend** link.

► Entering Tell a Friend information

1. On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **Configure and Customize**. The NetSolutions - Configure and Customize screen appears displaying the Account Information tab.

3. Select the Tell a Friend tab.

NetSolutions - Configure and Customize

Account Information | Organizational Information | Site Customization Defaults

Home Page | Donor Profiling | Additional Links | **Tell a Friend** | Site Map/Links

Tell a Friend
Enter any descriptive text that you want to appear at the top of your NetSolutions "Tell a Friend" page.

Have you found some part of our website to be of value to yourself and your colleagues? Please share your find so that we can continue to grow and flourish. This form will send emails to the addresses of your choice.

Submit Close

Note: If you choose to not enter a customized message on the Tell a Friend page, the following default message appears: "Have you found some part of our Web site to be of value to yourself and your colleagues? Please share your find so that we can continue to grow and flourish. This form will send emails to the addresses of your choice."

4. In the text box you can enter a message, encouraging visitors to your Web site to share information about your organization with a friend. You can accept the default message or enter a new message. This message appears when users click the **Tell a Friend** link on your Web site.

Wildlife Protection

Welcome to our online donation page **Mr. Frank Castanza**. Follow the steps below to help Wildlife Protection accomplish its mission: Saving endangered animals.
Give!



Animals have a life.

[View my Web donation history.](#)

[Tell a friend](#)

Donation Information

* Denotes Required Information

Amount*
☐ \$10 per month Save a fish
☐ \$100 per quarter Save a whale
☐ \$1,000 per year Save an ocean
☒ Other amount: \$

Designation: Endangered Animals

☐ This donation is on behalf of a company.
☐ I prefer to make this donation anonymously.

Show Bio

The link takes visitors to another page, where they can enter contact information about their friend.

Wildlife Protection

Tell a friend!
 Have you found some part of our website to be of value to yourself and your colleagues? Please share your find so that we can continue to grow and flourish. This form will send emails to the addresses of your choice.

*** Denotes Required Information**

Your Name*: Frank Castanza	Your Email address*: dkadilak@blackbaud.com
Friend's Name*: 	Friend's Email address*:

Subject:

Message:

Multiple Recipients
 To send this e-mail to more friends, include their information below:

Friend's Name:	Friend's Email address:

- When you complete this tab, select another tab, click **Submit** to send the configuration information to Blackbaud, or click **Close** to return to the NetSolutions page without submitting the configuration information to Blackbaud.

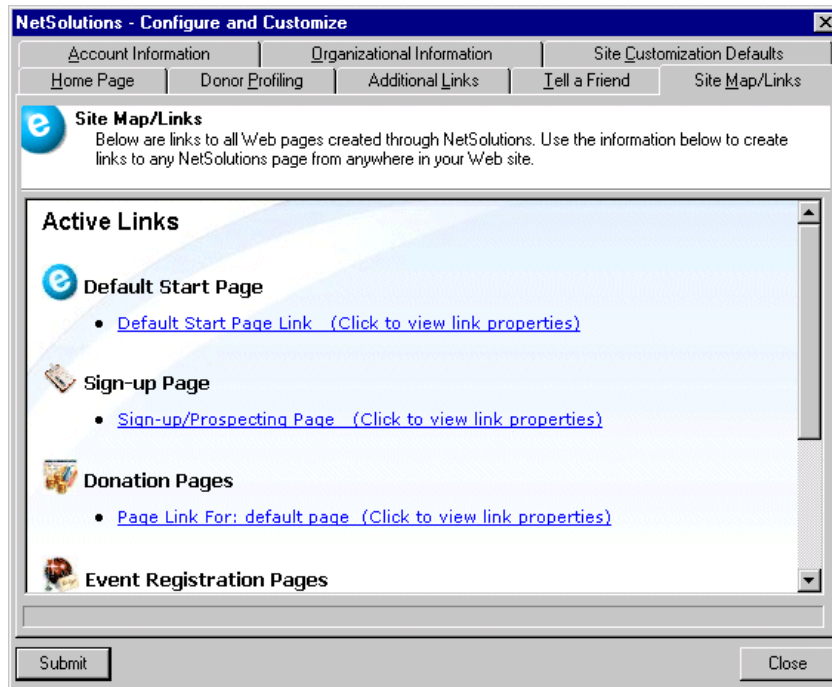
Site Map/Links (Add Links to Your Existing Home Page)

If you do not want to use the Home page included with your *NetSolutions* account, you can add to your organization's existing Web page links to any *NetSolutions* Web page using the Site Map/Links tab. This tab provides the code needed to add links to any online pages.

► Viewing site links

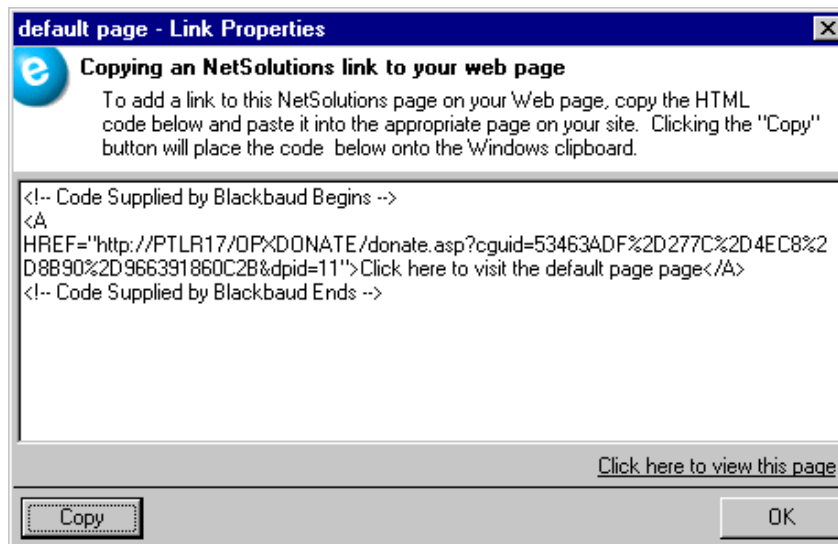
- On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
- Click **Configure and Customize**. The NetSolutions - Configure and Customize screen appears displaying the Account Information tab.

3. Select the Site Map/Links tab.



If you are using the Home page provided by Blackbaud, you do not need the links provided on this tab.

4. On the Site Map/Links tab, we provide code you can add to your Web page and add links to the various *NetSolutions* functions. For example, to provide a link on your Web page to the donation page you establish in **NetDonors**, under **Donation Pages**, click the **Page Link For** link. A screen similar to the following appears.



5. To view this page, click **Click here to view this page**.
6. To copy the code contained on this page, highlight the code and click **Copy**.

Note: We recommend that someone familiar with the design of your Web page perform this procedure.

7. To exit the screen, click **OK**. You can then paste the code into your Web page, adding a donation link to your page.

Adding a Change of Address Link to Your Home Page

Although there is not an option in *NetSolutions* from which you can create a customized Change of Address page to provide your users, you can provide a link to the standard Change of Address page included with *NetSolutions*.

Please complete the following to update your name and address information.

Click Submit when you are finished.

*** Denotes Required Information**

Biographical	
Title	Dr.
First Name	Steven
Last Name*	Frost
Address*	25 Water St.
City, State ZIP*	Cleveland, OH 44135
Country*	United States
Email*	steven.frost@hospital.org
☒ I wish to receive future email correspondence. ☐ I prefer to make my donations anonymously.	

Phones	
Phone 1	Home (216) 251-0987
Phone 2	Business (216) 456-1029
Phone 3	Cellular Phone (216) 659-4589

[RE:NetSolutions](#)
[Blackbaud](#)
[Privacy Statement](#)

Note: For information about downloading transactions, see “Downloading Transactions” on page 295

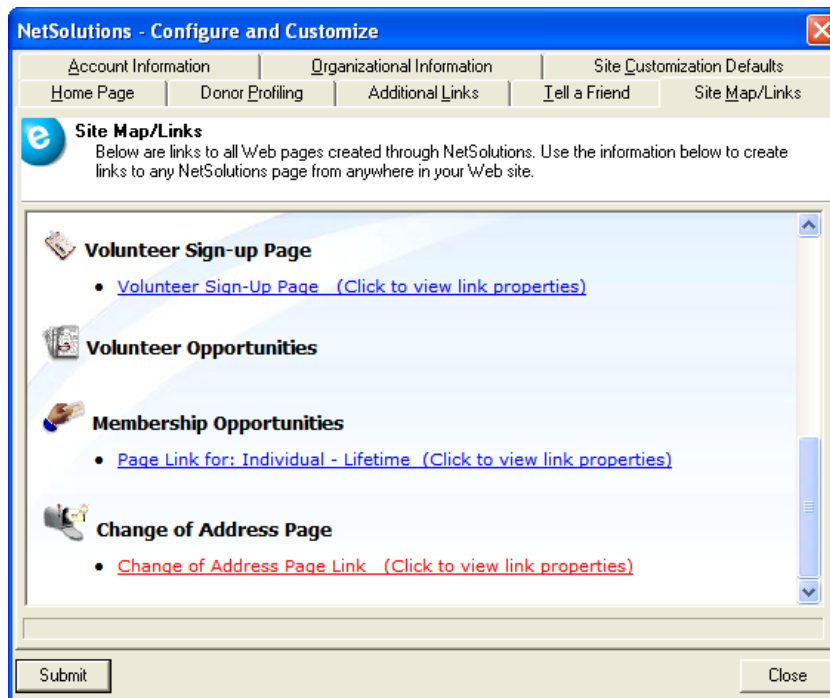
From this page, users enter their new address information and submit it to the *NetSolutions* server. The information is then available from **Download Transactions**.

You can also include Change of Address links in your **NetMail** correspondences. For more information, see “Including a Change of Address Link in Your Email Message” on page 119.

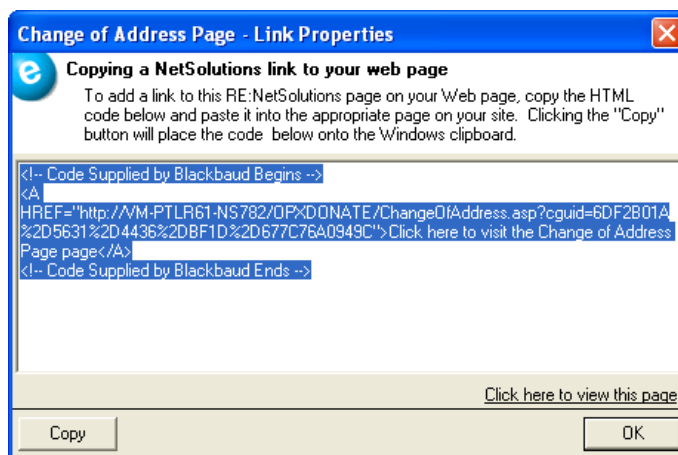
► Add a Change of Address link to your organization’s Home page

1. From **Configure and Customize**, select the the Site Map/Links tab.

2. Scroll down to the **Change of Address Page**.



3. Click **Change of Address Page Link**. The Change of Address Page - Link Properties screen appears. This screen includes the HTML code needed to add the **Change of Address** link to your organization's Home page.



4. Click **Copy** to copy the code to your clip board.
To view the default Change of Address page, click **Click here to view this page**.

Note: We recommend that someone familiar with the design of your Web page perform this procedure.

5. When you are ready to close the screen and copy the HTML code to your Home page, click **OK**. You return to the Configure and Customize screen. The code you just copied is available to paste from your clip board to your Home page source code.

Submitting Configuration and Customization Information

After you enter all the configuration and customization information you want Blackbaud to use when creating your *NetSolutions* Web page, sending the information to Blackbaud is as simple as clicking a button.

► Submitting information to Blackbaud

Warning: Before you submit your information to Blackbaud, you should verify that the titles table from your *Raiser's Edge* database is clean and acceptable for online display. Every time you submit your information to Blackbaud, the active titles from your database are sent to the server and are visible on your *NetSolutions* pages.

1. From any tab on the *NetSolutions* - Configure and Customize screen, click **Submit**.

A screen appears warning you the information you entered will update your *NetSolutions* Web pages.

2. To continue, click **Yes**. A screen appears telling you when the update is complete.



3. Click **OK**. Your *NetSolutions* Web site is configured. You return to the *NetSolutions* - Configure and Customize screen.
4. To return to the *NetSolutions* page, click **Close**.

NetDonors

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NetDonors offers a simple solution to the complex task of accepting online donations. With this service, Blackbaud acts as the application service provider (ASP) and handles the logistics of managing a donation page on your Web site. We handle everything. We host the donation page, store donation data, ensure data security, and validate credit card information.

You tell us what you want your donation page to offer; you can include a number of donation page options, online source information, giving levels, and honor/memorials. You can also add images to your donation page, select a default constituent code to assign new donors, customize your receipts, and much more.

Requirements For NetDonors

To use this service, you must have the following:

- A Web page
- **The Raiser's Edge 7.x**
- A merchant account with a credit card authorization service such as *Blackbaud Merchant Services* or IATS
- Verification of your (c)3, (c)4, or (c)6 certification. You must fax us an IRS Determination Letter at 843-216-6104.
- *Internet Explorer* 5.x or higher is fully supported; however donors can use HTML 3.2 compliant browsers as well

Interacting with The Raiser's Edge

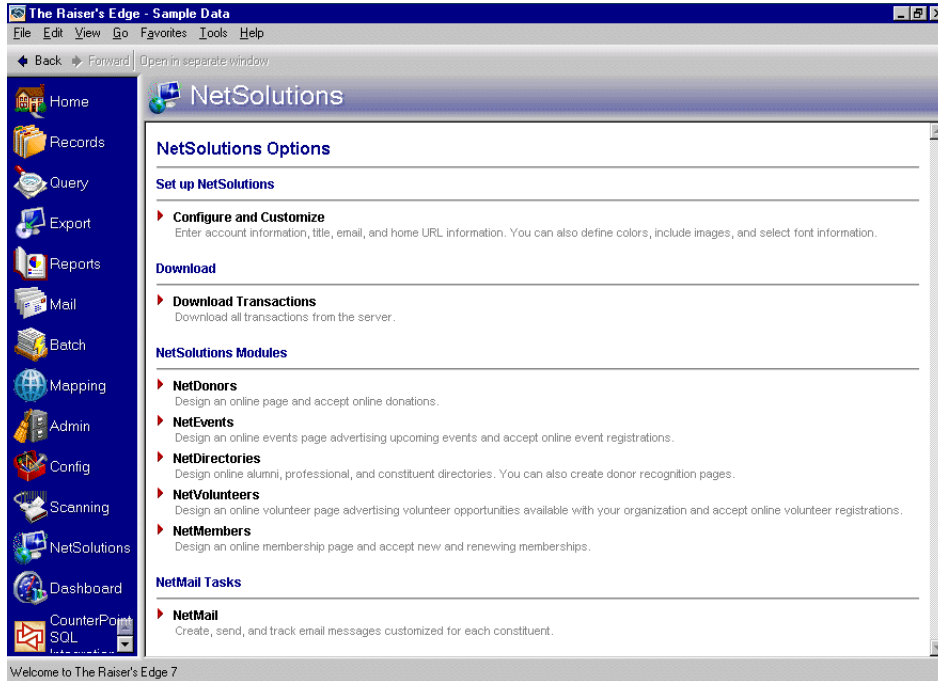
Warning: Before you start working in **NetDonors**, you must register as a *NetSolutions* user and enter your **Login ID** and **Login Password** in **Configure and Customize**. For more information, see "Registering with NetSolutions" on page 1 and "Configure & Customize" on page 11.

Using **NetDonors** in conjunction with **The Raiser's Edge**, your organization saves many hours in data entry time. With the **Download Transaction** link included with *NetSolutions*, you can link all donation information to the appropriate **Raiser's Edge** records or create new records for donors who are not yet constituents. The online donation information appears on the Gift tab of the constituent record.

Also, after you download the data from your Web site, the online information is available for use in **Raiser's Edge** reports, queries, and exports.

Navigating

In *The Raiser's Edge*, you access **NetDonors** by clicking **NetSolutions** on the Raiser's Edge bar.



Accessing NetDonors

Multiple users can access different areas of *NetSolutions* simultaneously.

► Accessing NetDonors

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

2. Click **NetDonors**. The NetSolutions - NetDonors screen appears.



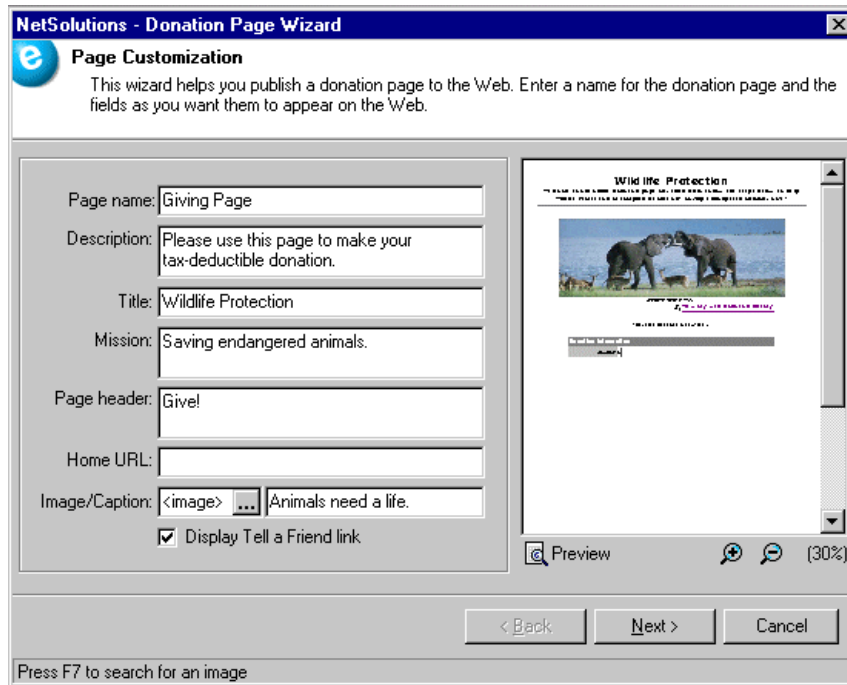
This screen displays all donation pages designed for **NetDonors**.

The **<default page>** is the basic donation page. The page style is based entirely on your selections in **Configure and Customize**. Using **NetDonors**, you can, however, change the style of your donation page and select to include a number of features. For information about creating a new page, see “Designing your NetDonors Page” on page 62.

Note: The **Optional Login** box appears only if you marked the **Allow donors to create accounts** checkbox on the Advanced Options screen in **Configure and Customize**. For more information, see the Account Information tab section in “Configure & Customize” on page 11.

3. To view the default Web page, click **Visit this donation page**. The default donation screen appears.

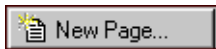
4. To create a new donation page, click **New Page**. The NetSolutions - Donation Page Wizard appears.



5. For more information about creating a new donation page, see “Designing your NetDonors Page” on page 62.
6. To return to the NetSolutions - NetDonors screen, click **Cancel**.

Buttons

NetDonors has two buttons to help you navigate through the program.



The **New Page** button opens the Donation Page Wizard, allowing you to design a new donation page.



The **Statistics** button displays two graphs: one breaking down the number of online donations received from each donation page and another displaying the number of visits to your online donation pages.

Designing your NetDonors Page

Warning: Before you start working in **NetDonors**, you must register as a *NetSolutions* user and enter your **Login ID** and **Login Password** in **Configure and Customize**. For more information, see “Registering with NetSolutions” on page 1 and “Configure & Customize” on page 11.

Although **NetDonors** comes with a default donation page, you may find you need more than one page to satisfy your organization’s needs, or you may want to style your donation page differently than your other *NetSolutions* pages. To help you best meet your fund raising needs and maintain consistency between your organization’s Web site and the *NetSolutions* Web pages maintained by Blackbaud, you can design your own donation pages.

Page Customization

This is the first procedure in a series of procedures, explaining the Donation Page Wizard. The following procedures should be used in succession.

- “Page Customization” on page 63
- “Page Style” on page 65
- “Designations” on page 65
- “Sources” on page 67
- “Gift Types” on page 69
- “Giving Levels” on page 75
- “Miscellaneous” on page 77
- “Donor Profiling” on page 84
- “Additional Links” on page 86
- “Merchant Account Information” on page 87
- “The Finish Screen” on page 89

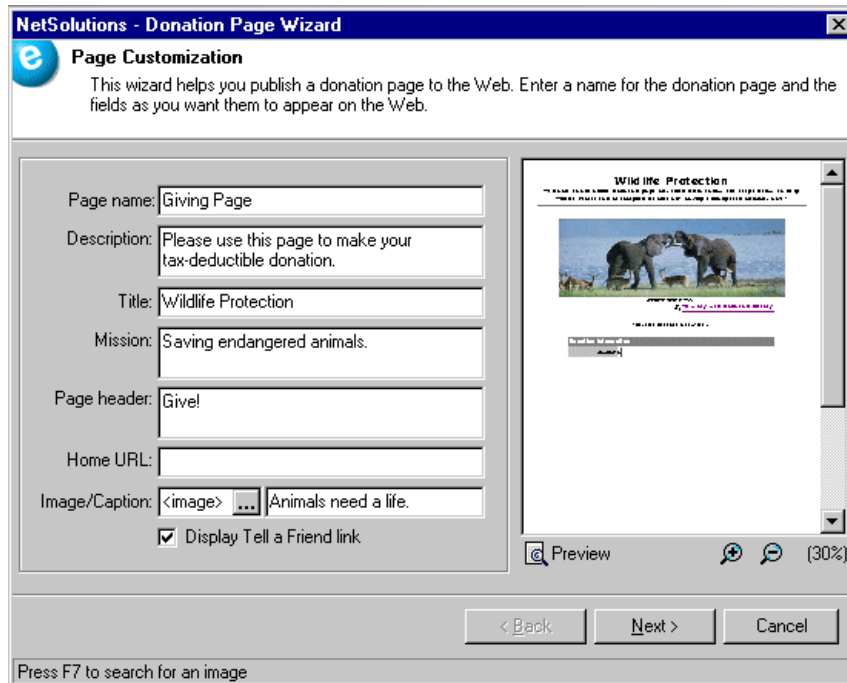
Using the Page Customization screen, you can configure the general appearance on your Web page. You can specify things such as the page’s name and description, as well as specify a picture to be displayed on your page. Multiple users can access different areas of *NetSolutions* simultaneously.

► Completing the Page Customization screen

1. On the Raiser’s Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **NetDonors**. The NetSolutions - NetDonors screen appears.



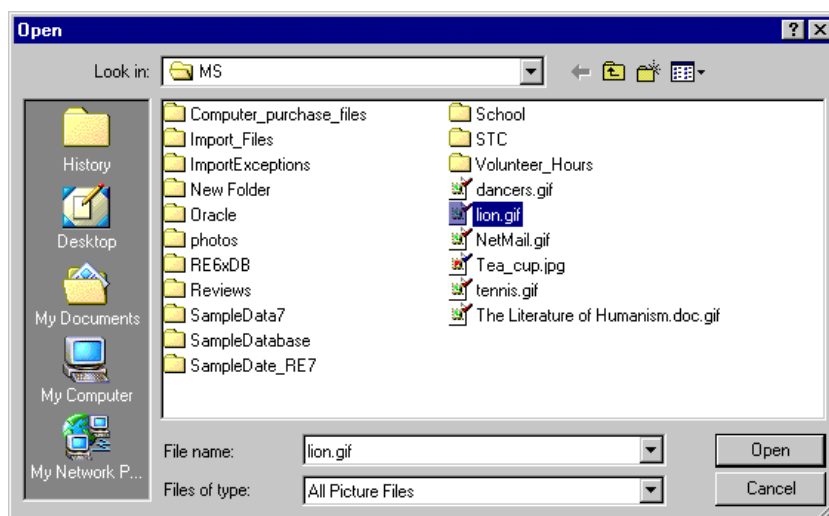
- Click **New Page**. The Donation page Wizard appears.



The **Title**, **Mission**, **Page header**, and **Home URL** fields default to the information you entered in **Configure and Customize**. You can change any default information on this screen.

Note: For more information about **Configure and Customize**, see “Configure & Customize” on page 11.

- Enter a **Page name**. This is used for the link taking your Web site visitors to your donation page.
- Enter a **Description** to appear under the link. There is a 1,024 character limit.
- To include an image on your donation page, in the **Image/Caption** fields, click the ellipsis to access the Open screen.



- Locate the image to include and click **Open**. You return to the Donation Page Wizard screen.
- In the second **Image/Caption** field, enter the caption to appear under the image.

9. In **Configure and Customize**, you design a **Tell a Friend** link which appears on your Web pages. The link takes visitors to another page, where they can enter contact information about their friend. If you do not want this link to appear on your donation page, unmark the **Display Tell a Friend** checkbox. Keep the checkbox marked if you want the link to appear on your donation page.

10. Click **Next** to move to the Page Style screen, or click **Cancel** to return to the NetSolutions page.

Page Style

This is the second procedure in a series of procedures, explaining the Donation Page Wizard. The following procedures should be used in succession.

- “Page Customization” on page 63
- “Page Style” on page 65
- “Designations” on page 65
- “Sources” on page 67
- “Gift Types” on page 69
- “Giving Levels” on page 75
- “Miscellaneous” on page 77
- “Donor Profiling” on page 84
- “Additional Links” on page 86
- “Merchant Account Information” on page 87
- “The Finish Screen” on page 89

Using the Page Style screen, you can give a donation page a unique look, setting it apart from your other *NetSolutions* pages. The style you established in **Configure and Customize** defaults to all your *NetSolutions* Web pages, but you can change the style for each donation page using the Page Style screen. The fields and checkboxes available on this screen change based on the **Page section** you select. You can change background, logo and title, image, header, detail, body, table legend, table headers, table text, and error text styles.

For more information about changing your donation pages’ style, see “Changing Page Style” on page 387.

If you are happy with the page style you established in **Configure and Customize**, do not make any changes on this screen. Click **Next** to move to the Designations screen, or click **Cancel** to return to the NetSolutions page.

Designations

This is the third procedure in a series of procedures, explaining the Donation Page Wizard. The following procedures should be used in succession.

- “Page Customization” on page 63
- “Page Style” on page 65
- “Designations” on page 65
- “Sources” on page 67
- “Gift Types” on page 69
- “Giving Levels” on page 75
- “Miscellaneous” on page 77
- “Donor Profiling” on page 84

- “Additional Links” on page 86
- “Merchant Account Information” on page 87
- “The Finish Screen” on page 89

Including designations on your donation page gives your donors a voice in deciding where their money goes. For example, the Wildlife Protection Association can include a “Endangered Animals” designation. They can then attach this designation to the *Raiser’s Edge* fund they use for their Endangered Animals project.

► Completing the Designations screen

Note: The **If no designation is specified use this fund** field defaults to the fund you selected in **Configure and Customize**. However, you can change your selection on this screen.

1. Once you complete the Page Style page, click **Next**. The Designations screen appears asking you to enter designations.

Default	Online Designation	Fund to Credit
☐		

If no designation is specified use this fund: 2008 Annual Fund

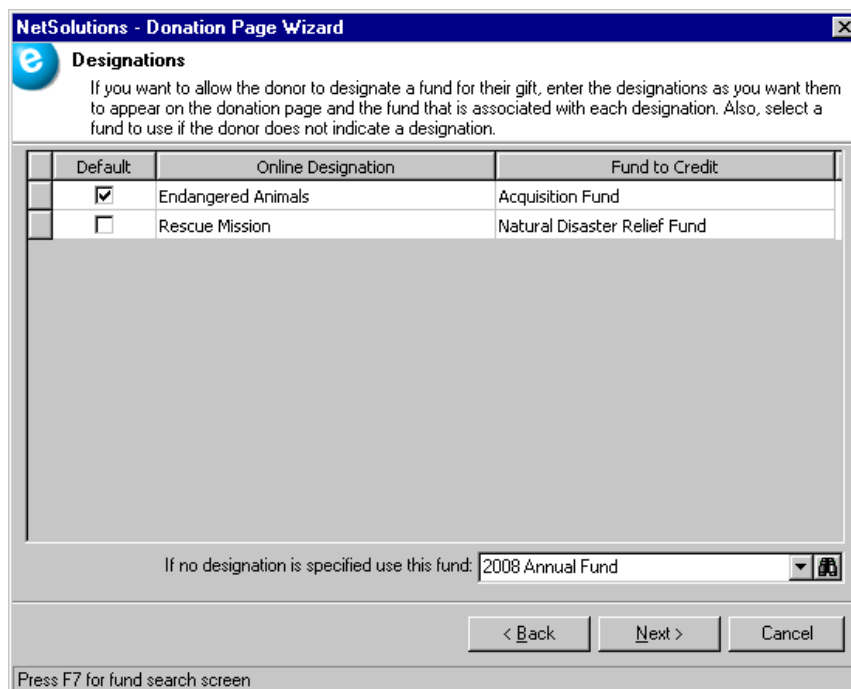
< Back Next > Cancel

Note: For detailed instructions about downloading information from your donation page, see “Downloading Transactions” on page 295.

Designations are options donors select to indicate where their donation should be used. Any designation information entered on your donation page appears in the **Reference** field on the Gift tab of the constituent record when you download the transaction.

2. On the Designations screen, in the **Online Designation** column, enter the description to appear on the donation page. For example, the Wildlife Protection Association included two designations — “Endangered Animals” and “Rescue Mission”.
3. In the **Fund to Credit** column, select the *Raiser’s Edge* fund you want credited for any donation given to the corresponding designation.
4. If a donor fails to select one of these options, the money goes into the fund selected in the **If no designation is specified use this fund** field.

5. In the **Default** column, mark the designation you want to default as the selected option on the Web page.



NetSolutions - Donation Page Wizard

Designations

If you want to allow the donor to designate a fund for their gift, enter the designations as you want them to appear on the donation page and the fund that is associated with each designation. Also, select a fund to use if the donor does not indicate a designation.

	Default	Online Designation	Fund to Credit
☒		Endangered Animals	Acquisition Fund
☐		Rescue Mission	Natural Disaster Relief Fund

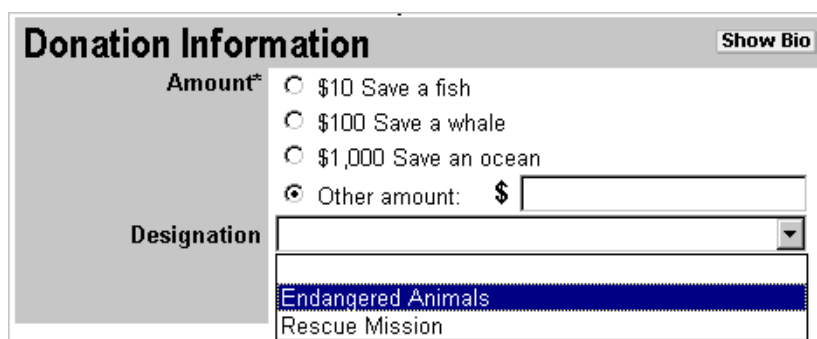
If no designation is specified use this fund: 2008 Annual Fund

< Back Next > Cancel

Press F7 for fund search screen

Information entered in the example above appears in a drop-down menu at the bottom of the **Donation Information** frame on your donation page.

This is what your online donor sees in the **Designation** field.



Donation Information Show Bio

Amount*

☐ \$10 Save a fish
☐ \$100 Save a whale
☐ \$1,000 Save an ocean
☒ Other amount: \$

Designation

Endangered Animals
 Rescue Mission

6. Click **Next** and move to the Sources screen, or click **Cancel** to return to the NetSolutions page.

Sources

This is the fourth procedure in a series of procedures, explaining the Donation Page Wizard. The following procedures should be used in succession.

- "Page Customization" on page 63
- "Page Style" on page 65
- "Designations" on page 65
- "Sources" on page 67

- “Gift Types” on page 69
- “Giving Levels” on page 75
- “Miscellaneous” on page 77
- “Donor Profiling” on page 84
- “Additional Links” on page 86
- “Merchant Account Information” on page 87
- “The Finish Screen” on page 89

Including source options on your donation page tells what attracted donors to your Web site. For instances, in the following example, the Wildlife Protection Association included “Visiting Web Site” and “Mailing” as source options. They also attached each source option to a *Raiser’s Edge* appeal; so whenever a donor selects one of the source options, the corresponding appeal is credited with the donation.

► Completing the Sources screen

1. Once you complete the Designations screen, click **Next**. The Sources screen appears.

NetSolutions - Donation Page Wizard

Sources

When you want donors to indicate how they heard about your site, enter each source as it should appear on the donation page. Beside each source, enter the appeal associated with it. Optionally, you can select an appeal to use if the donor does not indicate a source.

Source header:

Online Source	Appeal to Credit

If no source is specified use this appeal:

< Back Next > Cancel

If you include sources on your donation page, you can keep track of what draws donors to your donation page. You can also credit appeal records for any gifts.

2. In the **Source header** field, enter a heading for the online source section of your Web page. There is a 255 character limitation.
3. In the **Online Source** column, enter the options you want to appear on your Web page. In the following example, the Wildlife Protection Association included “Visiting Web Site” and “Mailing” as source options.
4. In the **Appeal to Credit** column, enter the appeal you want credited with donations associated with the source.

5. In the **If no source is specified use this appeal** field, select a default appeal to use should the donor not select a source. For instance, in the following example, donors have two source options to select when giving online: "Visiting Web Site" or "Mailing". If they select "Visiting Web Site" the "Internet/Web Site solicitations" appeal is credited for the donation; if they select "Mailing" the "Direct Mailing" appeal is credited for the donation. If no source is selected, the "Internet/Web Site solicitations" appeal is credited for the donation.

NetSolutions - Donation Page Wizard

Sources

When you want donors to indicate how they heard about your site, enter each source as it should appear on the donation page. Beside each source, enter the appeal associated with it. Optionally, you can select an appeal to use if the donor does not indicate a source.

Source header: How did you hear about us?

Online Source	Appeal to Credit
Visiting Web Site	Internet/Web Site solicitations
Mailing	Direct Mailing

If no source is specified use this appeal: Internet/Web Site solicitations

< Back Next > Cancel

Information entered in the example above appears in a drop-down menu at the bottom of your donation page.

This is what your online donor sees.

How did you hear about us?

Source

- Visiting Web Site
- Mailing

6. Click **Next** and move to the Gift Types screen, or click **Cancel** to return to the NetSolutions page.

Gift Types

This is the fifth procedure in a series of procedures, explaining the Donation Page Wizard. The following procedures should be used in succession.

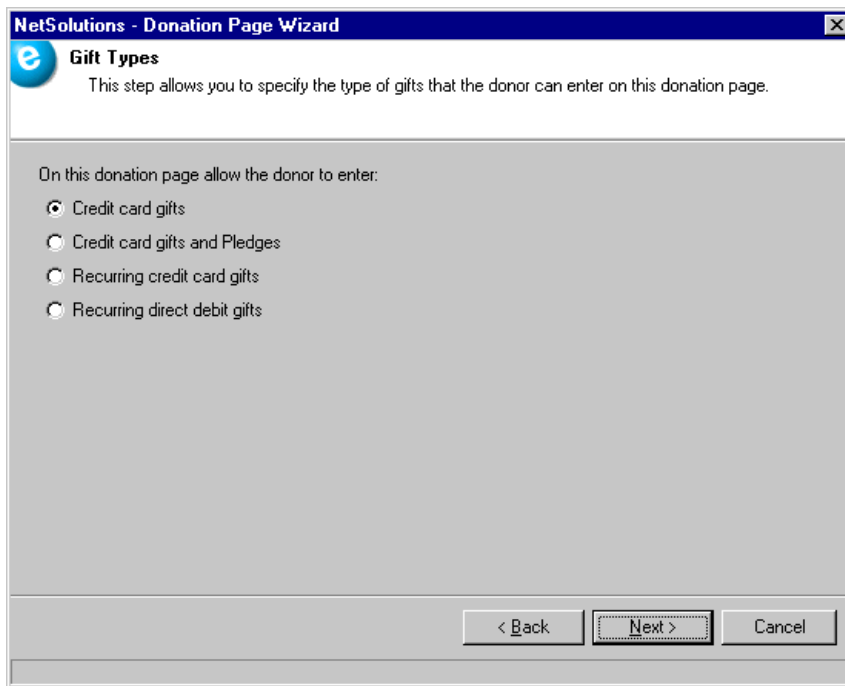
- "Page Customization" on page 63
- "Page Style" on page 65
- "Designations" on page 65
- "Sources" on page 67

- “Gift Types” on page 69
- “Giving Levels” on page 75
- “Miscellaneous” on page 77
- “Donor Profiling” on page 84
- “Additional Links” on page 86
- “Merchant Account Information” on page 87
- “The Finish Screen” on page 89

On the Gift Types screen, you can select the gift types available to donors on your donation page: **Credit card gifts**, **Credit card gifts and pledges**, **Recurring credit card gifts**, or **Recurring direct debit gifts**. You can select only one.

► **Completing the Gift Types screen**

1. Once you complete the Sources screen, click **Next**. The Gift Types screen appears.



2. Select the gift type you want available on your donation page.

Note: You establish security and rules regarding credit card donations on the Advanced Options screen, accessed from the Account Information tab in **Configure and Customize**. For more information, see “Configure & Customize” on page 11.

- The **Credit card gifts** option requires the online donor to enter credit card information. When you download the gift to *The Raiser’s Edge*, a gift record is created.

This is what your online donor sees.

Payment Information	
Credit Card Number*	
Type / Expiration Date*	MasterCard 08/08 (mm/yyyy)
Cardholder's Name*	Linda Smith
Card Security Code*	? Help
Comments	

- The **Credit card gifts and Pledges** option allows the online donor to choose between the **Credit Card** and **Bill me later** options online. When you download the gift into **The Raiser's Edge**, a pledge record is created if the client selected **Bill me later** and a gift record is created if the donor selected **Credit Card**.

This is what your online donor sees.

Payment Information	
Billing Option*	☒ Credit Card ☐ Bill me later
Credit Card Number*	
Type / Expiration Date*	MasterCard 08/08 (mm/yyyy)
Cardholder's Name*	Linda Smith
Card Security Code*	? Help
Comments	

- The **Recurring credit card gifts** option allows the online donor to make scheduled payments on the gift, using their credit card. If you select this option and click **Next**, the Frequency screen appears asking you to select scheduling options.

The screenshot shows a window titled "NetSolutions - Donation Page Wizard" with a sub-header "Frequency". Below the sub-header is a blue circular icon with a white 'e' and a paragraph: "This step determines which frequencies are valid for recurring gifts that are entered on this donation page." Below this is another paragraph: "You can indicate which frequencies are valid for online donations for this page. You can optionally define a schedule to be used for each frequency when the gifts are added to The Raiser's Edge." There are four rows of frequency options, each with a checked checkbox, a "Define Schedule..." button, and a default schedule description:

Frequency	Define Schedule...	Schedule Description
☒ Weekly	Define Schedule...	Every week on Sunday.
☒ Monthly	Define Schedule...	The 1st of every month.
☒ Quarterly	Define Schedule...	The 1st of every third month.
☒ Annually	Define Schedule...	On January 1st each year.

At the bottom of the window are three buttons: "< Back", "Next >", and "Cancel".

Mark the checkbox next to each frequency you want available online. To establish a specific schedule for each frequency, click the **Define Schedule** button next to the frequency checkbox. The Define Schedule screen for the selected frequency appears. Enter the requested frequency information, and click **OK**.

When you download the gift to **The Raiser's Edge**, a recurring gift record is created.

From the Web page, the online donor can choose to make his first payment now. If the donor does not mark **Charge the first payment to my credit card now**, the charges are applied based on the selection on the Frequency screen.

This is what your online donor sees.

The screenshot shows a web form for online donations. It is divided into two main sections: "Donation Information" and "Payment Information".

Donation Information:

- Amount*:** \$ 3,000 per year (dropdown menu)
- Until:** January 1, 2008 (dropdown menus)
- Designation:** Endangered Animals (dropdown menu)
- ☐ This donation is on behalf of a company.
- ☐ I prefer to make this donation anonymously.

Payment Information:

- Billing Option:** ☒ Charge the first payment to my credit card now.
- Credit Card Number*:** 4444 4444 4444 4444
- Type / Expiration Date*:** MasterCard 06/2008 (mm/yyyy)
- Cardholder's Name*:** Frank Castanza
- Card Security Code*:** 1234 [? Help](#)
- Comments:** Please mail monthly receipt.

- The **Recurring direct debit gifts** option allows the online donor to make scheduled payments on the gift using their debit card. If you select this option and click **Next**, the Frequency screen appears asking you to select scheduling options.

The screenshot shows a window titled "NetSolutions - Donation Page Wizard" with a sub-header "Frequency". Below the sub-header is a description: "This step determines which frequencies are valid for recurring gifts that are entered on this donation page."

Below this is a paragraph: "You can indicate which frequencies are valid for online donations for this page. You can optionally define a schedule to be used for each frequency when the gifts are added to The Raiser's Edge."

There are four frequency options, each with a checked checkbox and a "Define Schedule..." button:

- ☒ **Weekly** Define Schedule... Every week on Sunday.
- ☒ **Monthly** Define Schedule... The 1st of every month.
- ☒ **Quarterly** Define Schedule... The 1st of every third month.
- ☒ **Annually** Define Schedule... On January 1st each year.

At the bottom of the window are three buttons: "< Back", "Next >", and "Cancel".

Mark the checkbox next to each frequency you want available online. To establish a specific schedule for each frequency, click the **Define Schedule** button next to the frequency checkbox. The Define Schedule screen for the selected frequency appears. Enter the requested frequency information and click **OK**.

When you download the gift to **The Raiser's Edge**, a recurring gift record is created.

From the Web page, the online donor must enter their account information.

This is what your online donor sees.

Donation Information		Show Bio
Amount*	\$ 3,000	per year
Until	January	1, 2008
Designation	Endangered Animals	
☐ This donation is on behalf of a company.		
☐ I prefer to make this donation anonymously.		
Payment Information		
Financial Institution*	National Bank	
Branch Name	Charleston	
Transit/Routing no.*	00004784	? Help
Account Number*	12244500	
Account Type*	Checking	
Account Holder's Name*	Frank Castanza	
Comments	Please contact for Annual Ball.	

3. From the Donation Page Wizard screen, if you selected the **Recurring credit card gifts** option or the **Recurring debit card gifts** option, click **Next** to move to the Frequency screen. Otherwise, click **Next** to move to the Giving Levels screen, or click **Cancel** to return to the NetSolutions page.

Frequency

If you selected the **Recurring credit card gifts** option or the **Recurring debit card gifts** option on the Gift Types screen, the Frequency screen appears when you click **Next**. On this screen you establish schedule options to appear on the donation page. The online donor can then choose a payment schedule for his gift.

NetSolutions - Donation Page Wizard

Frequency

This step determines which frequencies are valid for recurring gifts that are entered on this donation page.

You can indicate which frequencies are valid for online donations for this page. You can optionally define a schedule to be used for each frequency when the gifts are added to The Raiser's Edge.

☒ Weekly	Define Schedule...	Every week on Sunday.
☒ Monthly	Define Schedule...	The 1st of every month.
☒ Quarterly	Define Schedule...	The 1st of every third month.
☒ Annually	Define Schedule...	On January 1st each year.

< Back Next > Cancel

Mark the checkbox next to each frequency you want available online. To establish a specific schedule for each frequency, click the **Define Schedule** button next to the frequency checkbox. The Define Schedule screen for the selected frequency appears. Enter the requested frequency information and click **OK**. The frequency options selected on this page will appear as options in the **Frequency** column on the Giving Levels screen.

Click **Next** to move to the Giving Levels screen, or click **Cancel** to return to the NetSolutions page.

Giving Levels

This is the sixth procedure in a series of procedures, explaining the Donation Page Wizard. The following procedures should be used in succession.

- "Page Customization" on page 63
- "Page Style" on page 65
- "Designations" on page 65
- "Sources" on page 67
- "Gift Types" on page 69
- "Giving Levels" on page 75
- "Miscellaneous" on page 77
- "Donor Profiling" on page 84
- "Additional Links" on page 86
- "Merchant Account Information" on page 87

- “The Finish Screen” on page 89

By including giving level options on your donation page, you can suggest donation amounts to your online donors. For example, in the following example, the Wildlife Protection Association defined three levels of giving: \$10, \$100, and \$1,000. They also attach a description to each option, suggesting what their organization can potentially do with each amount. If they specified **Recurring credit card gifts** or the **Recurring debit card gifts** on the Gift Types screen, they can also define the frequency of each giving level.

► Completing the Giving levels screen

Note: If on the Gift Types screen you selected a recurring gift option, a **Frequency** column is added to the Giving Levels screen. The frequency options are based on your selections on the Frequency screen.

1. Once you complete the Gift Types screen, click **Next**. The Giving Levels screen appears.

Level Amount	Frequency	Description

☒ Allow donor to specify another amount

< Back Next > Cancel

2. In the **Level Amount** column, enter the donation amount for this level. In the following example, the Wildlife Protection Association included \$10, \$100, and \$1,000 suggested amounts.
3. In the **Frequency** column, suggest a frequency for each giving level. The **Frequency** column appears only if you select the **Recurring credit card gifts** or the **Recurring debit card gifts** option on the Gift Types screen. You specify the options available for this column on the Frequency screen. In the following example, the Wildlife Protection Association suggests a monthly gift of \$10; or a quarterly gift of \$100; or an annual gift of \$1,000.

4. In the **Description** column, enter the description you want to appear on your donation page. In the following example, the Wildlife Protection Association described the \$10 donation as “Save a fish”, the \$100 donation as “Save a whale”, and \$1,000 as “Save an ocean.”

Level Amount	Frequency	Description
\$10.00	per month	Save a fish
\$100.00	per quarter	Save a whale
\$1,000.00	per year	Save an ocean

☒ Allow donor to specify another amount

< Back Next > Cancel

5. To allow online donors to specify an amount other than the amounts you enter on the Giving Levels screen, mark **Allow donor to specify another amount**.

Entries in the preceding example appear in the **Donation Information** frame on your donation page.

This is what your online donor sees.

Donation Information Show Bio

Amount* ☐ \$10 per month Save a fish
☐ \$100 per quarter Save a whale
☒ \$1,000 per year Save an ocean
☐ Other amount: \$ per year

6. Click **Next** and move to the Miscellaneous screen, where you can enter a default constituent code, customize your gift receipt, and more; or click **Cancel** to return to the NetSolutions - NetDonors page.

Miscellaneous

This is the seventh procedure in a series of procedures, explaining the Donation Page Wizard. The following procedures should be used in succession.

- “Page Customization” on page 63
- “Page Style” on page 65
- “Designations” on page 65
- “Sources” on page 67
- “Gift Types” on page 69

- “Giving Levels” on page 75
- “Miscellaneous” on page 77
- “Donor Profiling” on page 84
- “Additional Links” on page 86
- “Merchant Account Information” on page 87
- “The Finish Screen” on page 89

On the Miscellaneous screen, you can enter a default constituent code for new constituents making online donations, customize your gift receipt, and allow for online honor/memorials, corporate donations, and comments.

Selecting a Default Constituent Code

With *NetSolutions*, you can create a new constituent record when you download online gifts from first-time donors. To keep records as complete as possible, you can select to include a specific constituent code for all constituent records created when downloading gifts from your donation page. For example, if you want all records created while downloading online gifts assigned the constituent code of Online Donor, you can set this code as your default, using the Miscellaneous screen in the Donation Page Wizard.

► Selecting a default constituent code

1. From the Giving Levels screen in the Donation Page Wizard, click **Next**. The Miscellaneous screen appears.

2. In the **Constituent Code** frame, select a default constituent code in the **Enter the code to use when creating a new constituent record for a donor** field. The *Raiser's Edge* uses this constituency when creating records for online donors that do not have a constituent record in *The Raiser's Edge* database. For example, if you select “Online Donor”, all new constituents resulting from online donations are assigned the “Online Donor” constituent code.

3. Complete another section of the Miscellaneous screen. Or, if you completed this screen, click **Next** and move to “Donor Profiling” on page 84, or click **Cancel** to return to the NetSolutions - NetDonors page.

Selecting a Default Gift Code

With *NetSolutions*, you can download online gifts from online donors. To keep your records as complete as possible, you can select to include a specific gift code for all gifts downloaded from your donation page.

► Selecting a default gift code

1. From the Giving Levels screen in the Donation Page Wizard, click **Next**. The Miscellaneous screen appears.

2. In the **Gift Code** frame, select a default gift code in the **Enter the code to use when adding donations** field. The *Raiser's Edge* uses this code when adding gifts to the online donors records in *The Raiser's Edge* database.

3. Complete another section of the Miscellaneous screen. Or, if you completed this screen, click **Next** and move to "Donor Profiling" on page 84, or click **Cancel** to return to the NetSolutions - NetDonors page.

Customizing Layout

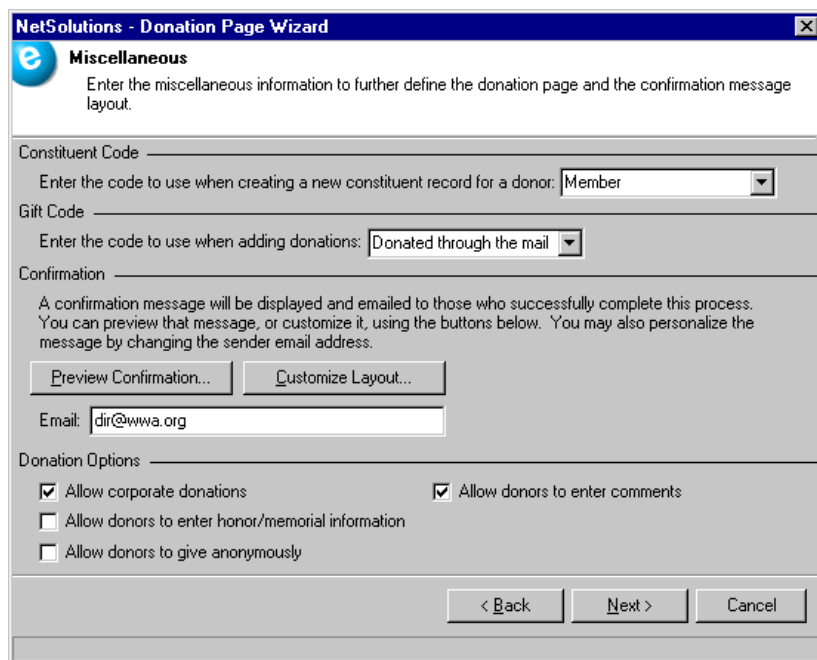
With *NetDonors*, you can customize donation confirmations automatically sent via email to your online donors. For more information, see "Customizing Confirmations" on page 367.

Entering a Donation Confirmation Email Address

In **Configure and Customize**, you enter an **Email** address that appears in the **From** field of all email confirmations sent from *NetSolutions*. If, however, you want a different email address to appear in donation confirmation email, you can enter the address on the Miscellaneous screen. The new address overrides the address entered in **Configure and Customize**.

► **Entering an email address for your donation confirmations**

1. From the Giving Levels screen in the Donation Page Wizard, click **Next**. The Miscellaneous screen appears.



The screenshot shows a window titled "NetSolutions - Donation Page Wizard" with a sub-header "Miscellaneous". Below the header, it says "Enter the miscellaneous information to further define the donation page and the confirmation message layout." The form contains several sections: "Constituent Code" with a dropdown menu set to "Member"; "Gift Code" with a dropdown menu set to "Donated through the mail"; "Confirmation" with a text area and two buttons "Preview Confirmation..." and "Customize Layout..."; "Email:" with a text field containing "dir@www.org"; and "Donation Options" with four checkboxes: "Allow corporate donations" (checked), "Allow donors to enter comments" (checked), "Allow donors to enter honor/memorial information" (unchecked), and "Allow donors to give anonymously" (unchecked). At the bottom are three buttons: "< Back", "Next >", and "Cancel".

2. In the **Email** field, enter the email address to appear in the **From** field of all email confirmations sent from **NetDonors**. This address overrides the address entered in **Configure and Customize**.

3. Complete another section of the Miscellaneous screen. Or, if you completed this screen, click **Next** and move to "Donor Profiling" on page 84, or click **Cancel** to return to the NetSolutions - NetDonors page.

Accepting Corporate Donations Online

You can choose to accept corporate donations online by marking one checkbox.

► Accepting corporate donations online

1. From the Giving Levels screen in the Donation Page Wizard, click **Next**. The Miscellaneous screen appears.

NetSolutions - Donation Page Wizard

Miscellaneous
Enter the miscellaneous information to further define the donation page and the confirmation message layout.

Constituent Code
Enter the code to use when creating a new constituent record for a donor: Member

Gift Code
Enter the code to use when adding donations: Donated through the mail

Confirmation
A confirmation message will be displayed and emailed to those who successfully complete this process. You can preview that message, or customize it, using the buttons below. You may also personalize the message by changing the sender email address.

Preview Confirmation... Customize Layout...

Email: dir@wwwa.org

Donation Options

☒ Allow corporate donations ☒ Allow donors to enter comments

☐ Allow donors to enter honor/memorial information

☐ Allow donors to give anonymously

< Back Next > Cancel

2. In the **Donation Options** frame, mark **Allow corporate donations** to accept corporate donations from your online giving page. If you mark this checkbox, the **This donation is on behalf of a company** checkbox is added to the bottom of the **Donation Information** frame on your donation page.

This is what your online donor sees.

Donation Information [Show Bio](#)

Amount: \$ per year

Until ,

Designation

☐ This donation is on behalf of a company.

☐ I prefer to make this donation anonymously.

3. Complete another section of the Miscellaneous screen. Or, if you completed this screen, click **Next** and move to “Donor Profiling” on page 84, or click **Cancel** to return to the NetSolutions - NetDonors page.

Accepting Honor/Memorial Donations Online

If your organization has Honor/Memorial Tracking, you can choose to accept honor/memorial donations online by marking one checkbox. Donors can also enter acknowledgee information online.

► Accepting honor/memorial donations online

1. From the Giving Levels screen in the Donation Page Wizard, click **Next**. The Miscellaneous screen appears.

NetSolutions - Donation Page Wizard

Miscellaneous
Enter the miscellaneous information to further define the donation page and the confirmation message layout.

Constituent Code
Enter the code to use when creating a new constituent record for a donor: Member

Gift Code
Enter the code to use when adding donations: Donated through the mail

Confirmation
A confirmation message will be displayed and emailed to those who successfully complete this process. You can preview that message, or customize it, using the buttons below. You may also personalize the message by changing the sender email address.

Preview Confirmation... Customize Layout...

Email: dir@wwa.org

Donation Options

☒ Allow corporate donations ☒ Allow donors to enter comments

☐ Allow donors to enter honor/memorial information

☐ Allow donors to give anonymously

< Back Next > Cancel

2. In the **Donation Options** frame, mark **Allow donors to enter honor/memorial information** to accept honor/memorial donations from your online giving page.

If you mark the **Allow donors to enter honor/memorial information**, the **This gift is in honor or memory of someone special** frame is added to your donation page. It also allows for acknowledgment information.

This is what your online donor sees.

This gift is in honor or memory of someone special: Hide Details

In Honor of

or In Memory of

Mail a letter on my behalf to the following person:

Full Name

Address

City, State ZIP

Country United States

Phone

E-mail

3. Complete another section of the Miscellaneous screen. Or, if you completed this screen, click **Next** and move to “Donor Profiling” on page 84, or click **Cancel** to return to the NetSolutions - NetDonors page.

Accepting Anonymous Donations

You can choose to accept anonymous donations from your online donors by marking one checkbox.

► Accepting anonymous donations with online donations

1. From the Giving Levels screen in the Donation Page Wizard, click **Next**. The Miscellaneous screen appears.

NetSolutions - Donation Page Wizard

Miscellaneous
Enter the miscellaneous information to further define the donation page and the confirmation message layout.

Constituent Code
Enter the code to use when creating a new constituent record for a donor: Member

Gift Code
Enter the code to use when adding donations: Donated through the mail

Confirmation
A confirmation message will be displayed and emailed to those who successfully complete this process. You can preview that message, or customize it, using the buttons below. You may also personalize the message by changing the sender email address.

Preview Confirmation... Customize Layout...

Email: dir@www.org

Donation Options

- ☒ Allow corporate donations
- ☒ Allow donors to enter comments
- ☐ Allow donors to enter honor/memorial information
- ☐ Allow donors to give anonymously

< Back Next > Cancel

2. In the **Donation Options** frame, mark **Allow donors to give anonymously** so donors can give anonymously on your online giving page. If you mark this checkbox, a checkbox appears at the bottom of the **Registration Information** frame on your donation page.

This is what your online donor sees:

Email: frankcastanza1234@aol.com

☐ I wish to receive future email correspondence.

☐ I prefer to make my donations anonymously.

Continue >

3. Complete another section of the Miscellaneous screen. Or, if you completed this screen, click **Next** and move to “Donor Profiling” on page 84, or click **Cancel** to return to the NetSolutions - NetDonors page.

Accepting Online Comments

You can accept comments from your online donors by marking one checkbox.

► Accepting comments with online donations

1. From the Giving Levels screen in the Donation Page Wizard, click **Next**. The Miscellaneous screen appears.

NetSolutions - Donation Page Wizard

Miscellaneous
Enter the miscellaneous information to further define the donation page and the confirmation message layout.

Constituent Code _____
Enter the code to use when creating a new constituent record for a donor: Member

Gift Code _____
Enter the code to use when adding donations: Donated through the mail

Confirmation _____
A confirmation message will be displayed and emailed to those who successfully complete this process. You can preview that message, or customize it, using the buttons below. You may also personalize the message by changing the sender email address.

Preview Confirmation... Customize Layout...

Email: dir@wwa.org

Donation Options

☒ Allow corporate donations ☒ Allow donors to enter comments

☐ Allow donors to enter honor/memorial information

☐ Allow donors to give anonymously

< Back Next > Cancel

2. In the **Donation Options** frame, mark **Allow donors to enter comments** to include a Comments section on your online giving page. If you mark this checkbox, a **Comments** box appears at the bottom of the **Payment Information** frame on your donation page.

This is what your online donor sees.

Payment Information

Financial Institution* _____

Branch Name _____

Transit/Routing no.* _____

Account Number* _____

Account Type* Checking

Account Holder's Name* _____

Comments _____

3. Complete another section of the Miscellaneous screen. Or, if you completed this screen, click **Next** and move to the Donor Profiling screen, or click **Cancel** to return to the NetSolutions - NetDonors page.

Donor Profiling

This is the eighth procedure in a series of procedures, explaining the Donation Page Wizard. The following procedures should be used in succession.

- “Page Customization” on page 63

- “Page Style” on page 65
- “Designations” on page 65
- “Sources” on page 67
- “Gift Types” on page 69
- “Giving Levels” on page 75
- “Miscellaneous” on page 77
- “Donor Profiling” on page 84
- “Additional Links” on page 86
- “Merchant Account Information” on page 87
- “The Finish Screen” on page 89

Donor profiling allows you to include questions on your donation page to gather additional information from donors. These questions help you segment, target, and cultivate your constituency. On the Donor Profiling screen, you can enter a profiling question specific to this donation page. The default donor profiling information, used for all **NetSolutions** functions, is entered in **Configure and Customize**.

► **Adding donor profiling information for your donation page**

1. Once you complete the screen asking you to enter miscellaneous options, click **Next**. The Donor Profiling screen appears.

Profiling Question	Attribute to Use
Did you receive our mailing?	Mailing

On this screen, enter questions to appear on your donation page. The questions can help you better understand your donors.

- For example, in the **Donor Profiling Question** column, you can ask the question “Did you receive our mailing?”. This question then appears at the end of the donor registration page. The question is limited to 120 characters.

Wildlife Protection

Please complete the following information. When you are finished, click Continue to enter your donation.

* Denotes Required Information

Registration Information

Title

First Name

Last Name*

Company Name

Address*

City, State ZIP*

Country*

Phone

Fax

E-mail*

☒ I wish to receive future e-mail correspondence.

☐ I prefer to make my donations anonymously.

Additional Information

☐ Did you receive our mailing?

Continue >

Note: Only yes/no constituent attributes appear in the **Attribute to Use** column.

- In the **Attribute to Use** column, you must assign the question to a constituent attribute in your database. In the example above, if the registrant marks **Did you receive our mailing?** on the donation page, the information appears on the Attribute tab of the constituent record.

On the constituent record, “Mailing” appears in the **Category** column and “Yes” appears in the **Description** column.

- From the Donation Page Wizard screen, click **Next** and move to the Additional Links screen, or click **Cancel** to return to the NetSolutions - NetDonors page.

Additional Links

This is the ninth procedure in a series of procedures, explaining the Donation Page Wizard. The following procedures should be used in succession.

- “Page Customization” on page 63
- “Page Style” on page 65
- “Designations” on page 65
- “Sources” on page 67

- “Gift Types” on page 69
- “Giving Levels” on page 75
- “Miscellaneous” on page 77
- “Donor Profiling” on page 84
- “Additional Links” on page 86
- “Merchant Account Information” on page 87
- “The Finish Screen” on page 89

From the Additional Links screen, you can add links to related Web pages. For example, you can add a link to a detailed explanation of your privacy policy.

► **Adding links to your online donation page**

1. Once you complete the Donor Profiling screen, click **Next**. The Additional Links screen appears.

Image	Caption	URL
<image>	A detailed explanation of our privacy policy.	http://privacy_matters

2. In the **Image** column, you must map to an image to use as the hyperlink on your donation page.
3. In the **Caption** column, enter the text visitors see when they hover their mouse over the hyperlink image.
4. In the **URL** column, enter the address of the Web page to which you are adding a link. The column accepts the URL with or without the <http://.
5. The **Path** column displays the location of the **Image** you selected.

6. From the Donation Page Wizard screen, click **Next** and move to the Merchant Account Information screen, or click **Cancel** to return to the NetSolutions - NetDonors page.

Merchant Account Information

This is the tenth procedure in a series of procedures, explaining the Donation Page Wizard. The following procedures should be used in succession.

- “Page Customization” on page 63

- “Page Style” on page 65
- “Designations” on page 65
- “Sources” on page 67
- “Gift Types” on page 69
- “Giving Levels” on page 75
- “Miscellaneous” on page 77
- “Donor Profiling” on page 84
- “Additional Links” on page 86
- “Merchant Account Information” on page 87
- “The Finish Screen” on page 89

On the Internet Merchant Account screen, you can change the Internet merchant account to use for this donation page. The default Internet merchant account, used for all **NetSolutions** functions, is entered in **Configure and Customize**.

► **Adding different merchant account information**

1. Once you complete the Additional Links screen, click **Next**. The Internet Merchant Account screen appears.

2. To activate this screen, mark **Use a different Internet Merchant Account for this page**.
 3. In the **Merchant account** field, select the account you want used for this page. You establish accounts in **Business Rules** accessed through *Config*.
-
4. Click **Next** and move to The Finish Screen, where you can complete your NetDonors page, or click **Cancel** to return to the NetSolutions - NetDonors page.

The Finish Screen

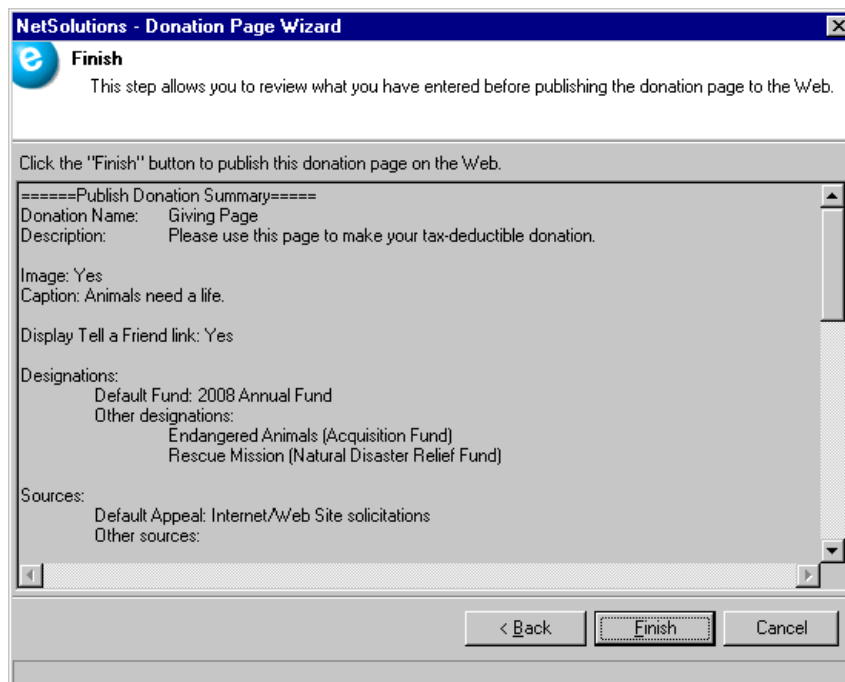
This is the last procedure in a series of procedures, explaining the Donation Page Wizard. The following procedures should be used in succession.

- “Page Customization” on page 63
- “Page Style” on page 65
- “Designations” on page 65
- “Sources” on page 67
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On the Finish screen, you can review all the information you entered in the NetSolutions - Denotation Page Wizard.

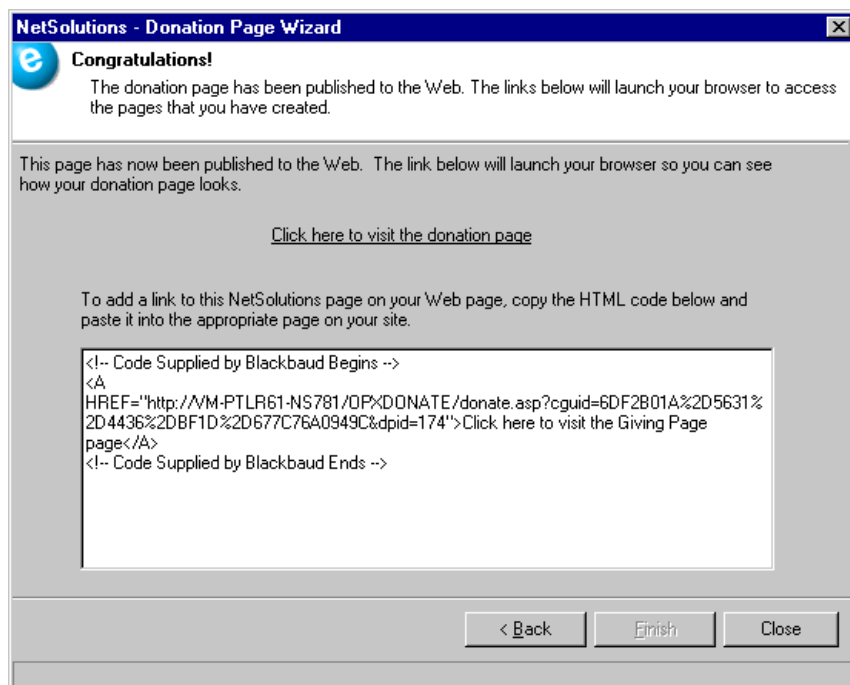
► Finishing the NetDonors page

1. After you enter all the necessary information on the various Donation page Wizard screens, a final screen appears, summarizing the settings you selected for your donation page.



2. To change any information, click **Back** and return to the screen you want to change.

3. If the information is correct, click **Finish** to submit the information to Blackbaud. A screen appears with a link to your new donation page.



4. To see how your donation page looks, click the **Click here to visit the donation page** link.
5. To add the donation page you just designed to your Web site, the code necessary to add the page to your site appears. Copy and paste this code to your Web site.
6. To exit the Donation page Wizard, click **Close**. You return to the NetSolutions - NetDonors screen. The new donation page link appears on the screen.
7. Click the "X" in the upper right corner to close the NetSolutions - NetDonors screen and return to the NetSolutions page.

Viewing your Donation Page

After you create your donation Web page, you can access and edit the page through *NetSolutions*.

► Viewing donation Web pages

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

2. Click **NetDonors**. The NetSolutions - NetDonors screen appears.



Note: The **Optional Login** box appears only if you marked the **Allow donors to create accounts** checkbox on the Advanced Options screen in **Configure and Customize**. For more information, see the Account Information tab section in “Configure & Customize” on page 11.

3. Click the **Visit this donation page** link. The Login Information screen appears.

Registration Information	
Title	
First Name	
Last Name*	
Company Name	
Address*	
City, State ZIP*	
Country*	United States
Phone	
Fax	
E-mail*	
☒ I wish to receive future e-mail correspondence. ☐ I prefer to make my donations anonymously.	
Additional Information	
Did you receive our mailing?	
Continue >	

Optional Login

Welcome back, Linda Kennedy. Please login to your account.

Login ID*

Password*

[Forgot my password](#)

Sign up for a free account that will enable you to easily make future donations and view previous Web transactions with Wildlife Protection Association

On this page, a first-time visitor must complete the **Registration Information** frame. If you marked the **Allow donors to create accounts** checkbox in **Configure and Customize**, the donor may create an account and enter **Login ID** and **Password** information. The next time they visit a *NetSolutions* Web page, they can enter their login information and not have to complete the **Registration Information** frame again.

4. To exit the NetSolutions - NetDonors screen and return to the NetSolutions page, click the X in the upper right corner.

Deleting a Donation Web Page

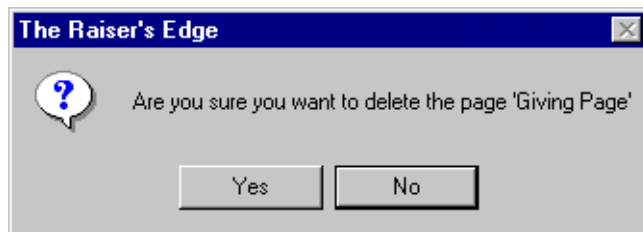
You can permanently remove a donation page from your Web site.

► Deleting a donation page

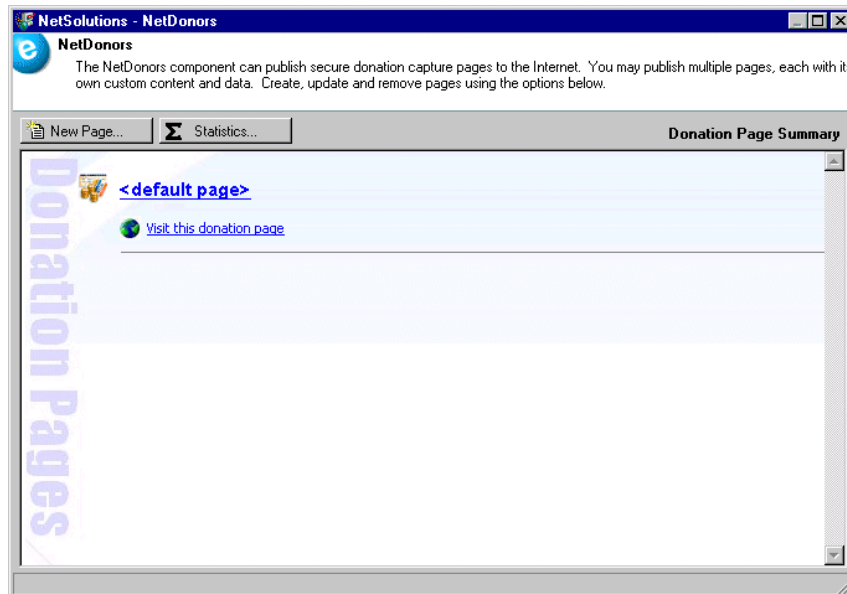
1. On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **NetDonors**. The NetSolutions - NetDonors screen appears. All donation pages created in **NetDonors** appear.



3. Click **Delete this donation page** under the donation page you want to delete. A warning message appears.



- Click **Yes**. The NetSolutions - NetDonors screen appears, minus the deleted donation page.



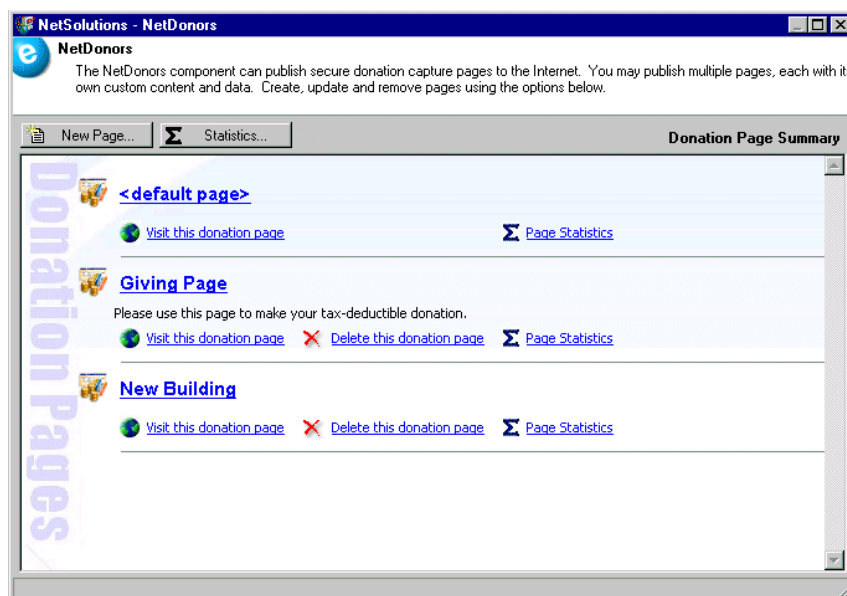
- To exit this screen and return to the NetSolutions page, click the "X" in the upper right corner.

Viewing Donation Statistics

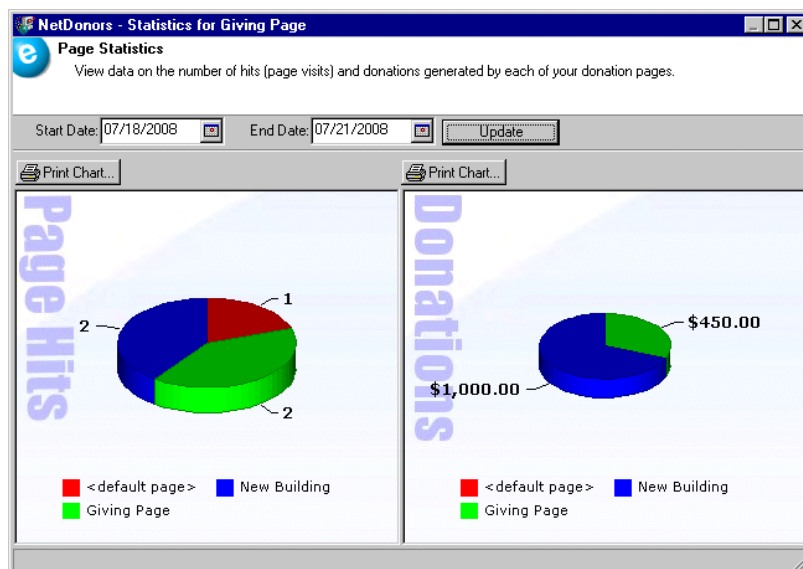
NetSolutions keeps track of how many times your online donation pages are visited and how much money each page generates. You can view statistics for all donation pages or for one page.

► Viewing donation page statistics

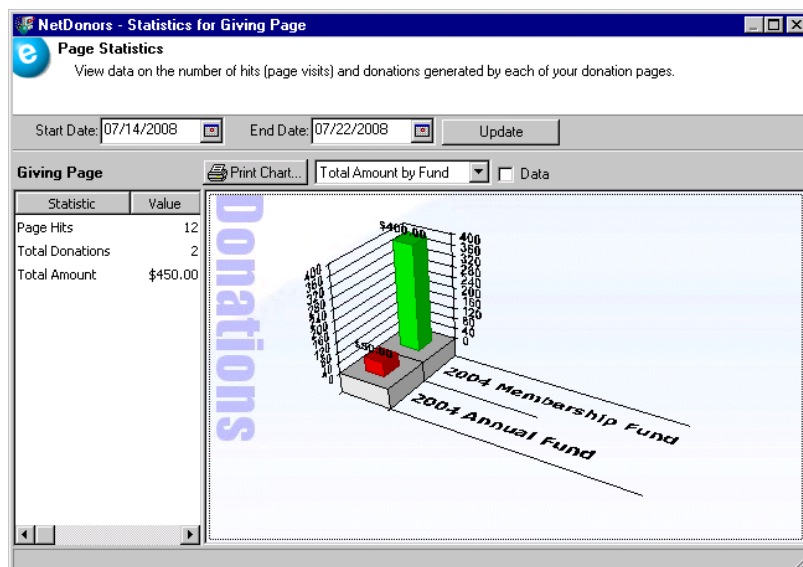
- On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
- Click **NetDonors**. The NetSolutions - NetDonors screen appears.



- To view a statistical overview of traffic and donations on all your donation pages, click **Statistics**. The NetDonors - Donation Page Statistics screen appears.



- Page Hits, on the left side of the screen, shows how many times each donation page was visited. In the preceding example, the <default page> was visited one time, the Giving Page was visited two times, and the New Building page was visited two times.
 - Donations, on the right side of the screen, shows how much money each page generated. In the preceding example, the Giving Page generated \$450, and the New Building page generated \$1,000.
 - If you want to see statistics for a specific period, enter a **Start Date** and **End Date**, and click **Update**.
 - Click **Print Chart** above each graph to print the graph.
- To view statistics for a specific page, from the NetDonors page, click the **Page Statistics** link included below the donation page link. The Donation Page Statistics screen appears.



- To see statistics for a specific period, enter a **Start Date** and **End Date**, and click **Update**.
- Click **Print Chart** above the graph to print the statistic information.
- In the drop-down field above the chart, select to view Donations by Fund or Total Amount by Fund.

- If you mark the **Data** checkbox, the graphic is replaced by columns, showing the **Fund** name and either the **Amount** given to each fund or the **Number** of gifts given to each fund, depending on what you select in the drop-down field: Donations by Fund or Total Amount by Fund.
 - The left screen displays the number of Page Hits, Total Donations, and Total Amount donated from the donation page.
5. To close the screen and return to the NetSolutions - NetDonors screen, click the "X" in the upper right corner.

NetMail

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With **NetMail** you can create, send, and track email messages. This link provides you with an easy way to create an email message, using fields from **The Raiser's Edge**. Once you create and send the message, you can save the file to use again at a later date or to simply help you keep track of the email messages sent to constituents.

How it Works

NetMail works with export files you create in **The Raiser's Edge**. Using *Export*, you select the group of constituents from your database to whom you want the message sent. You also select **The Raiser's Edge** fields you want available for your message. The export file functions as a data source in **NetMail**. You access the export file through the **Select Export** field in **NetMail**. All the fields you include in your export file are available in the tree view under **Available Fields**.

Warning: Before you start working in **NetMail**, you must register as a *NetSolutions* user and enter your **Login ID** and **Login password** in **Configure and Customize**. For more information, see "Registering with NetSolutions" on page 1 and "Configure & Customize" on page 11.

For example, if you include **First Name** and Last Name in your export file, in **NetMail**, when composing your email message, you can enter "Dear" then move <First Name> and <Last Name> from the tree view into your message box. The message is personalized with the constituent's first and last name (Dear Robert Datko or Dear Linda Kennedy). The email editor included in **NetMail** makes this possible. The process is similar to that used when doing a mail merge in a word processor or with **The Raiser's Edge**. With this editor, in addition to including exported fields in your message, you can include links to your donation pages, Web sites, email addresses, and much more.

When you submit the email message, Blackbaud sends it to all constituents included in the export file. If for some reason an email address does not work and the message returns to Blackbaud's server, you can download this information from the **Download Transactions** link available on the NetSolutions page. For detailed instructions on downloading this information, see "Downloading Transactions" on page 295.

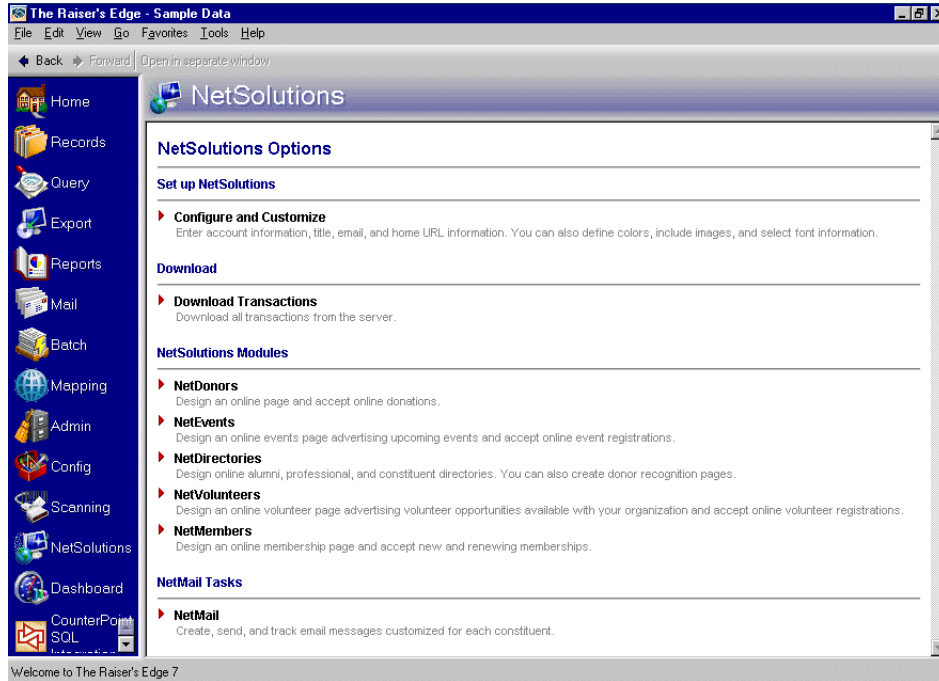
Requirements for NetMail

To use this service, you must have the following:

- *Internet Explorer* 5.x or higher is fully supported; however donors can use HTML 3.2 compliant browsers as well
- **The Raiser's Edge 7.x**

Navigating

In *The Raiser's Edge*, you access **NetMail** by clicking **NetSolutions** on the Raiser's Edge bar.



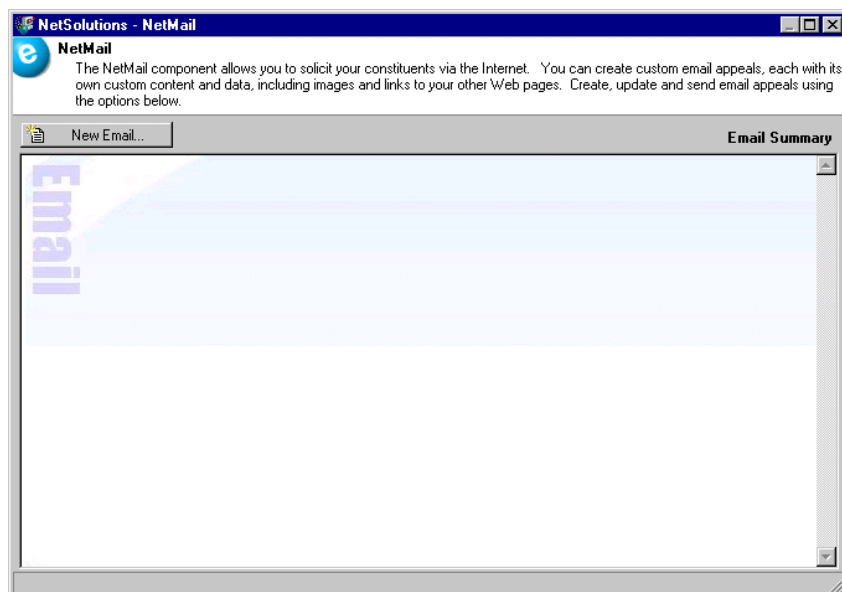
Accessing NetMail

Multiple users can access different areas of *NetSolutions* simultaneously.

► Accessing NetMail

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

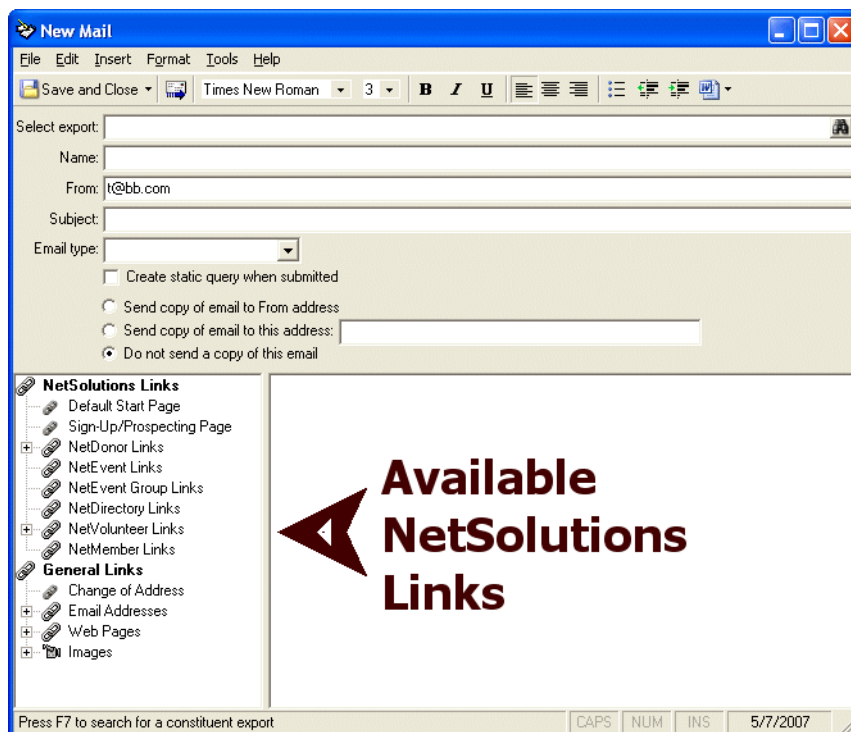
2. Click **NetMail**. The NetMail screen appears.



The first time you open the link, this screen appears blank. Once you create and save an email file, the saved email file appears.

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

3. To create a new email file, click **New email**. The New Mail screen appears.

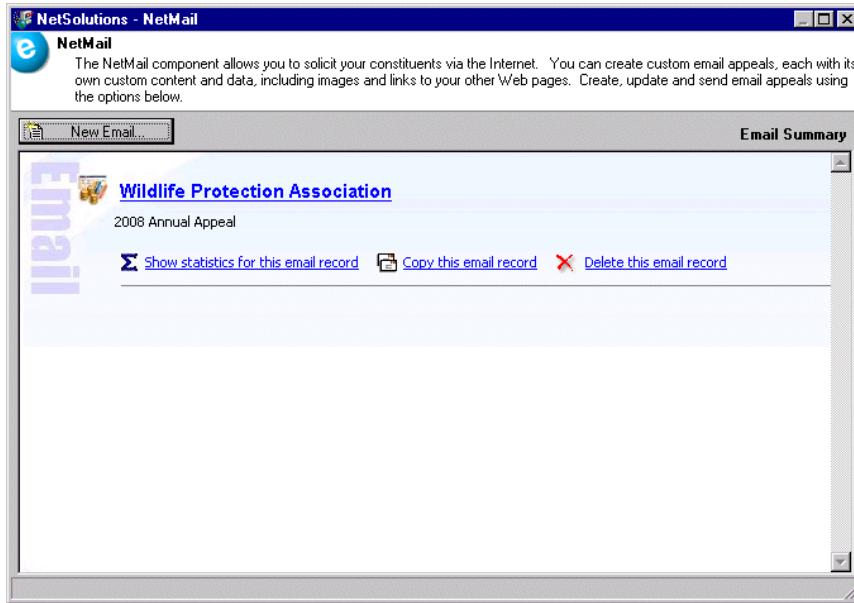


Note: For more information about completing this screen, see “Creating a New Email File” on page 103.

4. On the left, under **NetSolutions Links**, is a list of all *NetSolutions* modules your organization currently has. If you have Web pages available for any of these modules, you can include a link to the Web page in your email message.

Note: The **NetEvent Links**, **NetDirectory Links**, **NetVolunteer Links**, and **NetMember Links** tree view categories appear on the Mail screen only if you have the respective *NetSolutions* module installed.

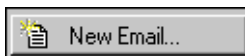
5. Also on the left, under **General Links** is a list of non-*NetSolutions* links you can include in your email message.
6. When you click **Save and Close**, the new email file appears as a link on the NetMail screen.



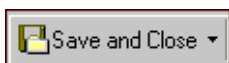
7. To open the above email file, click **Wildlife Protection Association**.
8. To see a detailed breakdown of online responses to this email, click **Show statistics for this email record**.
9. To use this email file as a starting point for a new email file, click **Copy this email record**. The email file opens, so you can make any necessary changes and save the file under a new name.
10. To delete the email file, click **Delete this email record**.
11. To exit this screen, click the "X" in the upper right corner. You return to the NetSolutions page.

Buttons

NetMail has four buttons to help you navigate through the program.



The **New Email** button on the NetMail screen opens the New Mail screen, where you can create a new email file.



The **Save and Close** button on the New Mail screen saves and closes your new email file without submitting it for delivery to your constituents.



Click the **Submit email** button on the New Mail screen to submit your email for delivery to all selected constituents.



Click the **Microsoft Word Functions** button to access *Word's* **Spelling** check and **Thesaurus**.

Creating a New Email File

Warning: Before you start working in **NetMail**, you must register as a *NetSolutions* user and enter your **Login ID** and **Login password** in **Configure and Customize**. For more information, see “Registering with NetSolutions” on page 1 and “Configure & Customize” on page 11.

When you create an email, you can choose to include a number of links to other sections of *NetSolutions*. For example, you can add a link taking recipients to your online jobs page or your giving page.

Multiple users can access different areas of *NetSolutions* simultaneously.

Composing an Email Message

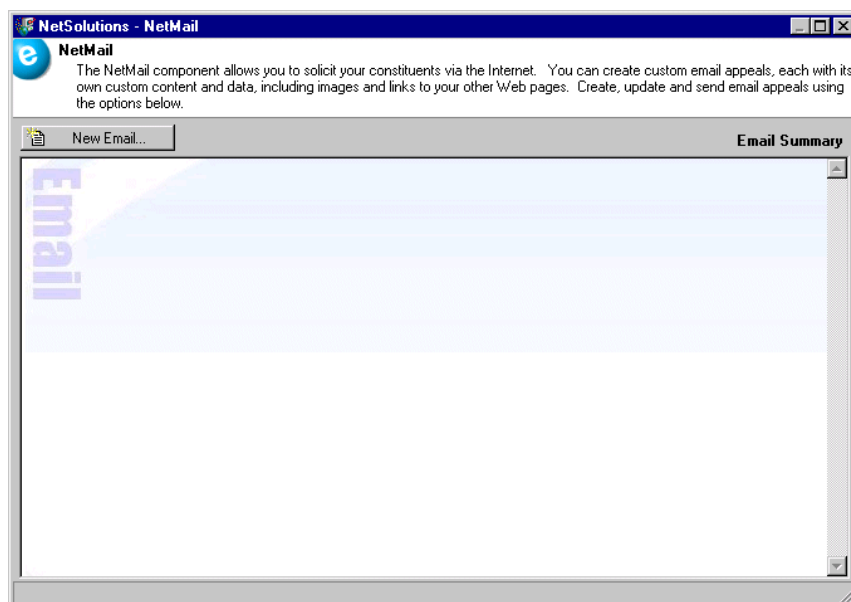
You compose the message on the New Mail screen in **NetMail**. The New Mail screen includes an email editor. With this editor, you access your data source (the export file) and add any field you included in your export file in your message. For example, if you include the **First Name** and Last Name fields in your export file, you can include both fields in your message. So if you enter “Dear «First Name» «Last Name»”, each constituent’s first and last name appear in their email message.

► Composing your email message

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

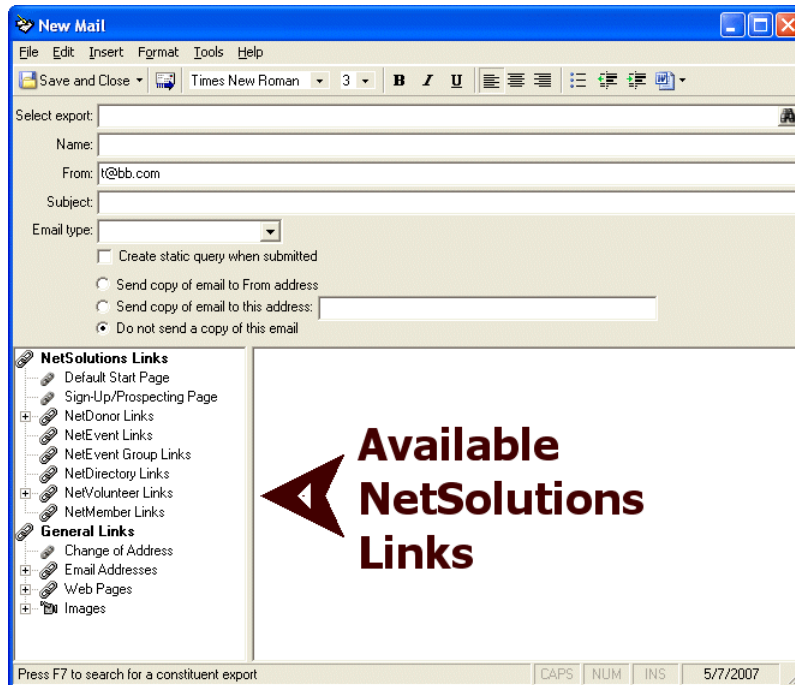
Note: *The Raiser’s Edge* is compliant only with MAPI email software, such as Microsoft *Outlook*.

2. Click **NetMail**. The NetMail screen appears.

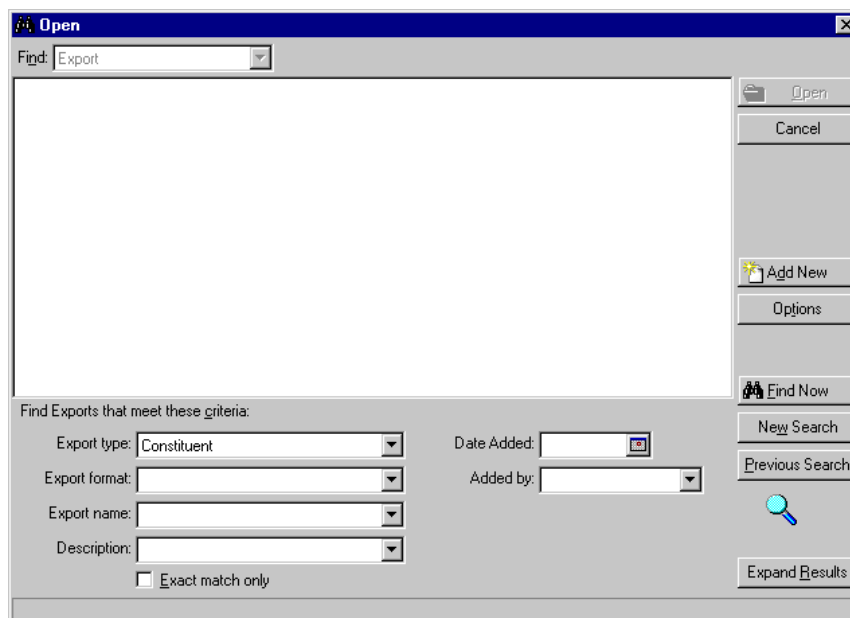


Note: The **NetEvent Links**, **NetDirectory Links**, **NetVolunteer Links**, and **NetMember Links** tree view categories appear on the Mail screen only if you have the respective *NetSolutions* module installed.

3. Click **New Email**. The New Mail screen appears.



4. In the **Select export** field, you must select the export file containing the constituents to whom to send this message and the fields to include in your message. Click the binoculars to access the Open screen.



Warning: You can use only constituent exports. Also, only flat export formats work (word processor mail merge, simple, .csv). For more information about export formats, see the Export chapter in the *Query & Export Guide*.

5. In the **Find Exports that meet these criteria** frame, enter criteria to narrow the export file search, and click **Find Now**. For example, you can enter an **Export type** and **Export format**. Or, you can leave the criteria fields blank, and click **Find Now** to access all export files saved in your database.

All exports satisfying the selected criteria appear in the export grid. For more information about using the Open screen, see the *Program Basics Guide*.

6. Select an existing export and click **Open**.

Or

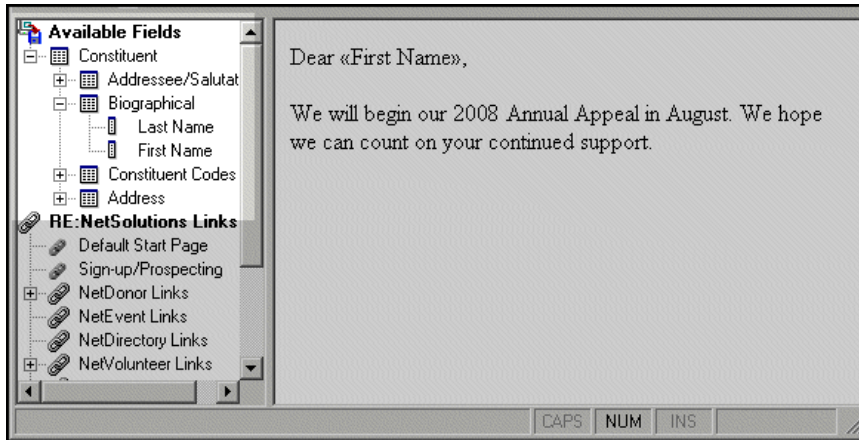
Click **Add New** to open *Export* and create a new export file.

Once you select or create an export, the export name appears in the **Select export** field on the New Mail screen.

Warning: If you change the export file, you may invalidate fields already in the email. For example, you first select an export with the field <Last Name>, and you insert this field into your email (Dear Mr. <Last Name>). You then change to a second export that does not include <Last Name>. A message appears warning you some fields are invalid. The invalid fields are highlighted.

7. In the **Name** field, enter a name for this email file. This name appears on the NetMail screen when you save and close the email message.
8. In the **From** field, defaults from the **Email** field on the Account Information tab of **Configure and Customize**.
9. In the **Subject** field, enter the purpose of the email. This appears in the **Subject** field of the sent email message. For example, if you are sending this email to announce your 2008 Annual Appeal, you can enter this in the **Subject** field.
10. In the **Email Type** field, select the email type to use when sending the email message. The options available depend on the phone types created in the **Phone Types** table in *Configuration*. For more information, see the Configuration chapter of the *Configuration and Security Guide*.
11. Mark the **Create static query when submitted** checkbox to create a query of all constituents to whom the email was sent. You can use the query to determine which constituents in the export did not receive the email and investigate why or send them the message using a nonelectronic mailing.

12. Select the **Send copy of email to From address** if you want the email address included in the **From** field to receive a copy of the email.
13. Select the **Send copy of email to this address** if you want another email address to receive a copy of the email. Enter the email address to which you want a copy sent in the corresponding field.
14. Select the **Do not send a copy of this email** if you want only those addresses included in the export file to receive this email.
15. Compose your message in the box on the right. To include exported fields, click the plus sign to the left of the fields in the **Available Fields** category in the tree view. A list of all fields you can include in your message appears.



All fields you include in your export file are available. When composing your message, double-click the fields you want to include in your message. This moves the field into the box on the right. For instance, in the preceding example, “First Name” was moved into the box on the right. When constituent Robert Brown receives this message, it begins “Dear Robert”; when constituent Linda Kennedy receives this message, it begins “Dear Linda”.

16. Select another category from the tree view; or click **Save and Close** to save your message and return to the NetSolutions - Net Mail screen; or select **File, Submit** from the menu bar to send your message. For more information on submitting your message, see “Submitting an Email Message” on page 126.

Adding a Link to Your Home Page

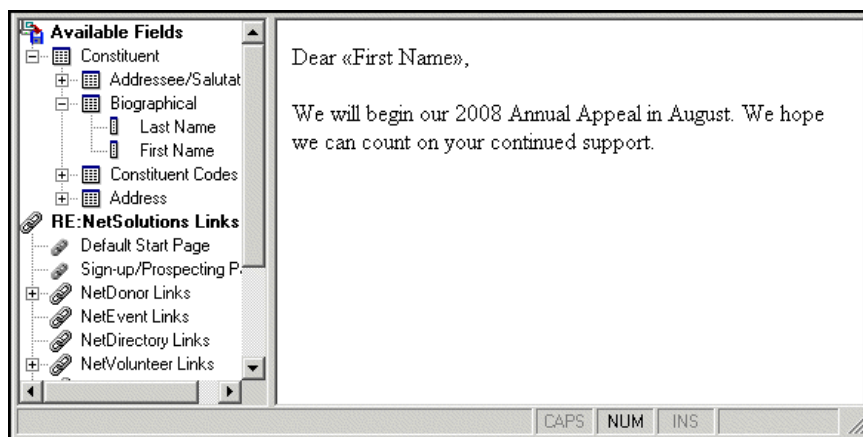
If your organization uses the Blackbaud-hosted Home page, containing all functions offered in *NetSolutions*, you can include a link to this Home page in your email message. With this link, an email recipient can access all your *NetSolutions* Web pages — **NetDonors**, **NetMail**, **NetEvents**, **NetVolunteers**, **NetMembers**, and **NetDirectories**. For more information about the Blackbaud-hosted Home page, see “Configure & Customize” on page 11.

Note: The **NetEvent Links**, **NetDirectory Links**, **NetVolunteer Links**, and **NetMember Links** tree view categories appear on the Mail screen only if you have the respective *NetSolutions* module installed.

This procedure is a continuation from the Composing your email message procedure. For more information about composing your email message, see “Composing your email message” on page 103.

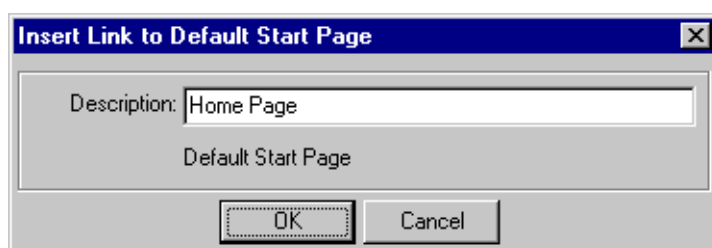
► **Adding a Home page link to your email**

1. Open the message to which you want to add a Home page link. For information about opening a message, see “Navigating” on page 100.



In the tree view, under the **NetSolutions Links** category, all available *NetSolutions* links appear.

2. To include a link to the Blackbaud-hosted Web page, in the tree view, double-click **Default Start Page**. The Insert Link to Default Start Page screen appears.



3. In the **Description** field, enter what you want the link to say in your email message.
4. Click **OK**. The new link appears in your message.



5. On the New Mail screen, select another category from the tree view; or click **Save and Close** to save your message and return to the NetMail screen; or select **File, Submit** from the menu bar to submit your message. For more information on submitting your message, see “Submitting an Email Message” on page 126.

Adding a Link to Your Online Registration Page

Note: The **NetEvent Links**, **NetDirectory Links**, **NetVolunteer Links**, and **NetMember Links** tree view categories appear on the Mail screen only if you have the respective *NetSolutions* module installed.

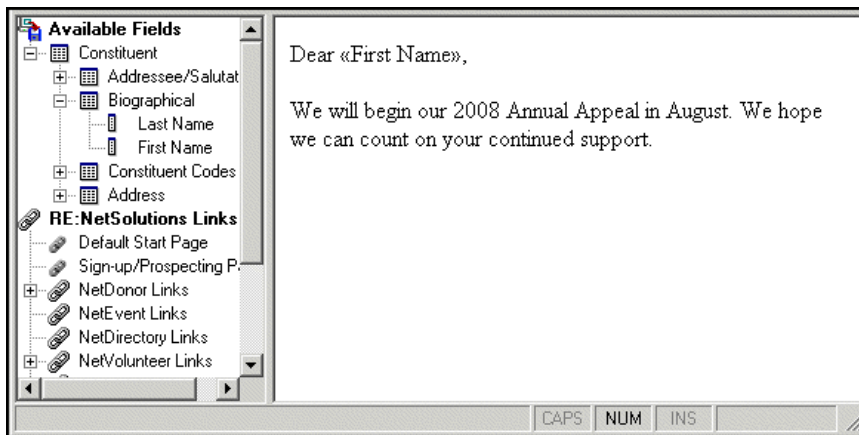
To encourage constituents to use the online options included with *NetSolutions*, there is an online registration page. On this page, visitors enter basic biographical information, such as name, address, telephone number, as well as a login and password. The login and password make return visits to your Web pages easy, allowing constituents direct access to your donation page, event registration page, etc., without requiring them to reenter their biographical information.

This procedure is a continuation of the Composing your email message procedure. For more information about composing your email message, see “Composing your email message” on page 103.

Note: The online registration page allows visitors to register a login and password, making subsequent visits to your *NetSolutions* Web pages easier. It also helps you cultivate new constituents.

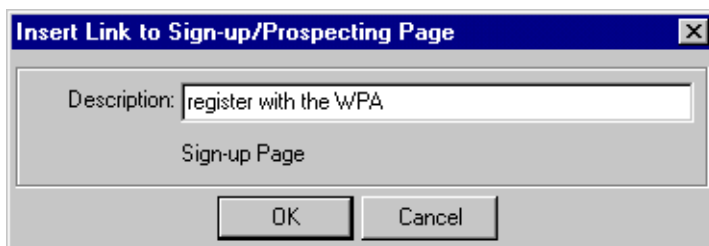
► Adding an online registration page link to your email

1. Open the message in which you want to add an online registration link. For information about opening a message, see “Navigating” on page 100.



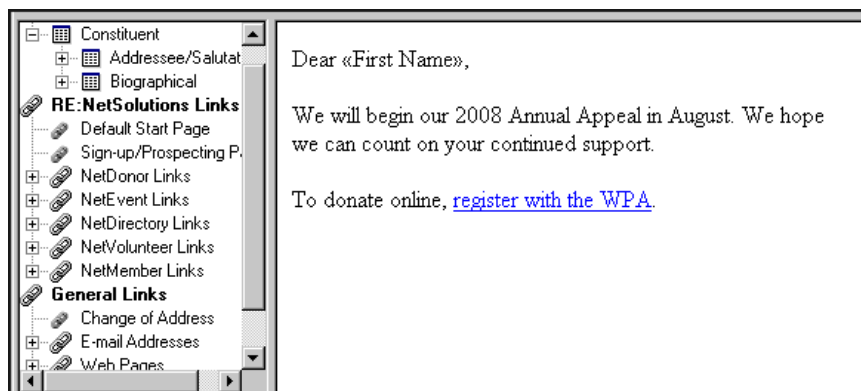
In the tree view, under the **NetSolutions Link** category, all available *NetSolutions* links appear.

2. To include a link to your online registration page, double-click **Sign-up/Prospecting Page** in the tree view. The Insert Link to Sign-up/Prospecting Page appears.



3. In the **Description** field, enter what the link is to say in your email message. For example, enter “register with the WPA”.

- Click **OK**. The new link appears in your message.



- Select another category from the tree view; or click **Save and Close** to save your message and return to the NetMail screen; or select **File, Submit** from the menu bar to submit your message. For more information on submitting your message, see “Submitting an Email Message” on page 126.

Adding a Donation Page Link to Your Email

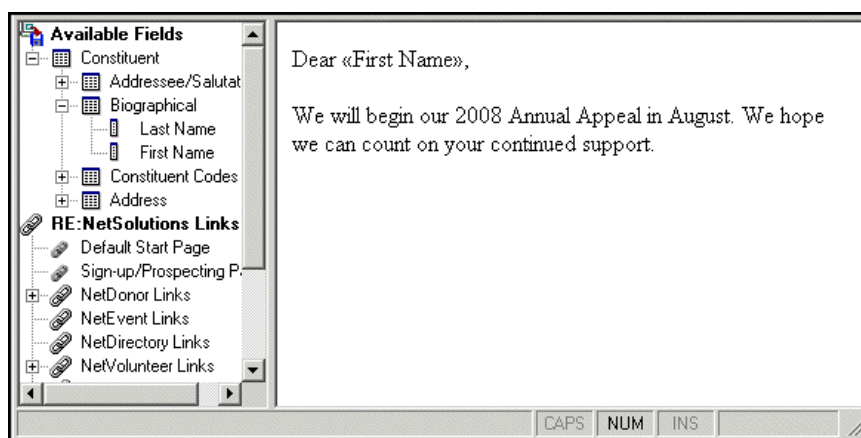
To encourage constituents to donate online, include a link to your online donation page. To add this link, you must have **NetDonors**.

Note: The **NetEvent Links**, **NetDirectory Links**, **NetVolunteer Links**, and **NetMember Links** tree view categories appear on the Mail screen only if you have the corresponding optional *NetSolutions* module.

This procedure is a continuation from the Composing your email message procedure. For more information about composing your email message, see “Composing your email message” on page 103.

► Adding a link to your donation page

- Open the message in which to add a donation page link. For information about opening a message, see “Navigating” on page 100.



In the tree view, under the **NetSolutions Links** category, all available *NetSolutions* links appear.

2. To include a link to your the online donation page(s) you created in **NetDonors**, double-click **NetDonor Links** in the tree view. All available donation pages appear under **NetDonor Links**.

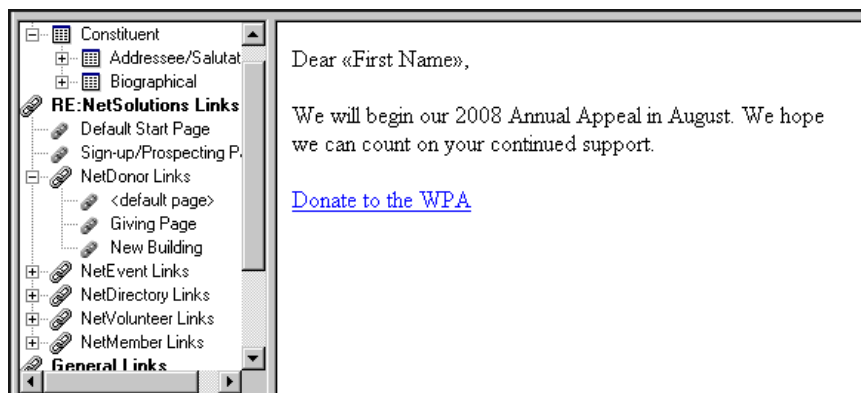


3. Double-click the page to which you want to create a link. The Insert Link to NetDonor Page screen appears.

Note: For more information about **NetDonors**, see “NetDonors” on page 57.

4. In the **Description**, field, enter what you want the link to say in your message. In the proceeding example, the donor will click on the words “Donate to the WPA” to access your donation page.
5. Enter the **Campaign**, **Fund**, **Appeal**, or **Package** to be credited for any donations.
6. For record keeping and reporting purposes, you can keep an up-to-date count of the number of constituents sent this message by marking the **Update number solicited for this appeal** checkbox. This information may prove helpful when trying to evaluate the success of the email effort. When you download your online transactions, the **No. solicited** field on the General tab of the appeal record is updated.
7. If the email is an appeal and your organization tracks appeals on constituent records, mark **Add this appeal to the constituent's record**. You can then enter the **Date** to appear with the appeal and any **Comment**.

8. Click **OK**. The new link appears in your message.



9. On the New Mail screen, select another category from the tree view; or click **Save and Close** to save your message and return to the NetMail screen; or select **File, Submit** from the menu bar to submit your message. For more information on submitting your message, see “Submitting an Email Message” on page 126.

Adding an Online Event Page Link to Your Email

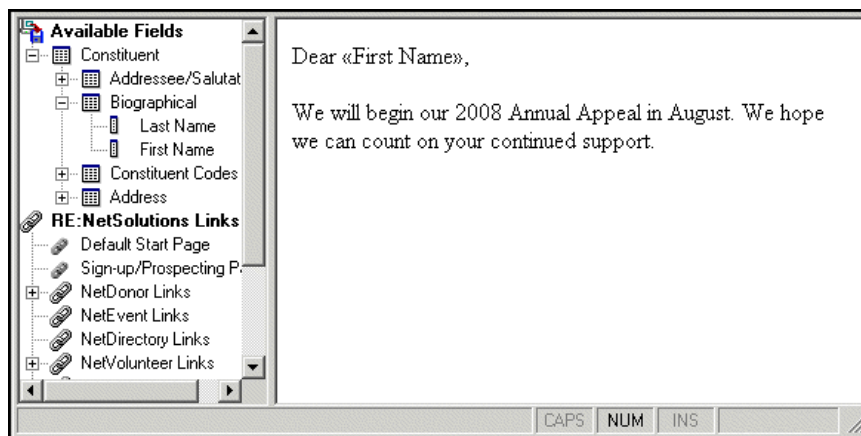
To help promote an upcoming event, use **NetMail** to send event announcements to your constituents. You can also include a link to your event Web page. To add this link, you must have **NetEvents**.

Note: The **NetEvent Links**, **NetDirectory Links**, **NetVolunteer Links**, and **NetMember Links** tree view categories appear on the Mail screen only if you have the respective *NetSolutions* module installed.

This procedure is a continuation from the Composing your email message procedure. For more information about composing your email message, see “Composing your email message” on page 103.

► Adding a link to your online event page

1. Open the message in which to add an event page link. For information about opening a message, see “Navigating” on page 100.



In the tree view, under the **NetSolutions Links** category, all available *NetSolutions* links appear.

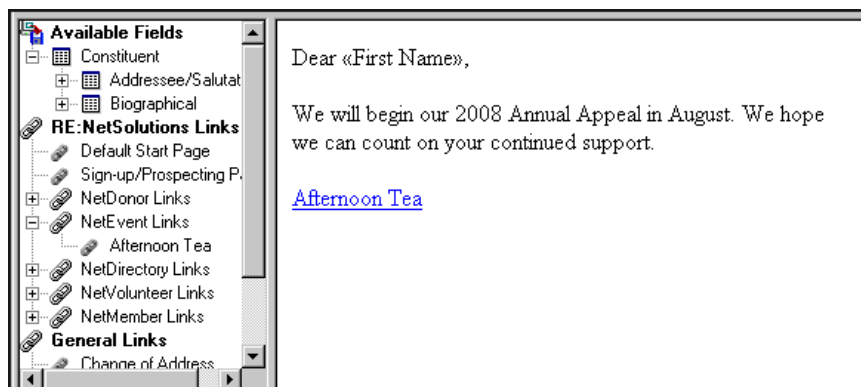
2. To include a link to your online event page(s) created in **NetEvents**, double-click **NetEvent Links** in the tree view. All available event pages appear under **NetEvent Links**.



3. Double-click the event page to which you want to create a link. The Insert Link to NetEvent Page screen appears.

4. In the **Description** field, enter what you want the link to say in your message. In the above example, the donor will click on the words "Afternoon Tea" to access your online event page.
5. Enter the **Campaign**, **Fund**, **Appeal**, or **Package** to be credited for any registration fees paid online.
6. For record keeping and reporting purposes, you can keep an up-to-date count of the number of constituents sent this message by marking the **Update number solicited for this appeal** checkbox. This information is helpful when trying to evaluate the success of the email. When you download your online transactions, the **No. solicited** field on the General tab of the appeal record is updated.
7. If the email is an appeal, and your organization records appeals on constituent records, mark **Add this appeal to the constituent's record**. You can then enter the **Date** you want to appear with the appeal and any **Comment**.

8. Click **OK**. The new link appears in your message.



9. Select another category from the tree view; or click **Save and Close** to save your message and return to the NetSolutions - Net Mail screen; or select **File, Submit** from the menu bar to submit your message. For more information on submitting your message, see "Submitting an Email Message" on page 126.

Adding an Online Directory Link to Your Email

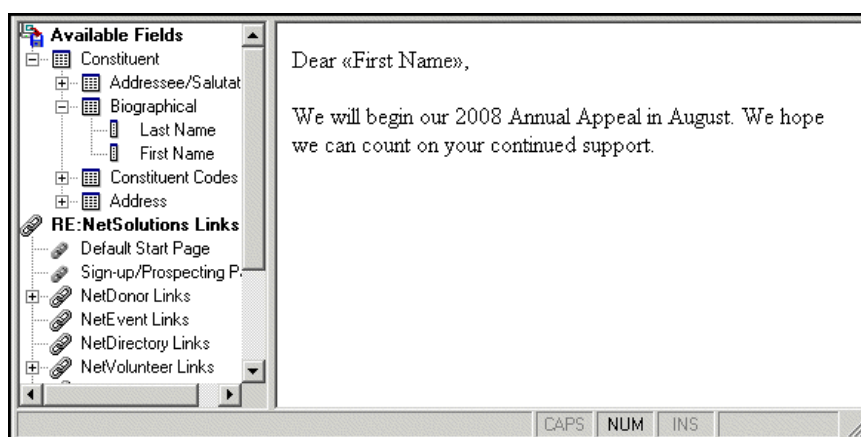
You can include in your email message a link to any online directory pages you created in **NetDirectories**. To add this link, you must have **NetDirectories**.

Note: The **NetEvent Links**, **NetDirectory Links**, **NetVolunteer Links**, and **NetMember Links** tree view categories appear on the Mail screen only if you have the respective *NetSolutions* module installed.

This procedure is a continuation from the Composing your email message procedure. For more information about composing your email message, see "Composing your email message" on page 103.

► Adding an online directory link to your email

1. Open the message in which to add a directory page link. For information about opening a message, see "Navigating" on page 100.



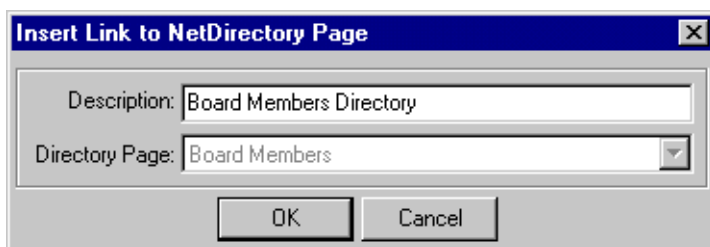
In the tree view, under the **NetSolutions Links** category, all available *NetSolutions* links appear.

2. To include a link to the online directory page(s) you created in **NetDirectories**, double-click **NetDirectory Links** in the tree view. All available directory pages appear under **NetDirectory Links**.



Note: For more information about online directories, see “NetDirectories” on page 165.

3. Double-click the directory page to which you want to create a link. The Insert Link to NetDirectory Page screen appears.



4. In the **Description** field, enter what you want the link to say in your message. In the previous example, the donor will click on the words “Board Members Directory” to access the online directory.
5. The **Directory Page** field, displays the online directory to which this description is linked.
6. Click **OK**. The new link appears in your message.



If an email recipient clicks the **Board Members Directory** link, he is taken to the online directory search page. This page is formatted based on your selections in **Configure and Customize** and **NetDirectories**.

7. Select another category from the tree view; or click **Save and Close** to save your message and return to the NetSolutions - Net Mail screen; or select **File, Submit** from the menu bar to submit your message. For more information on submitting your message, see “Submitting an Email Message” on page 126.

Adding an Online Job Page Link to Your Email

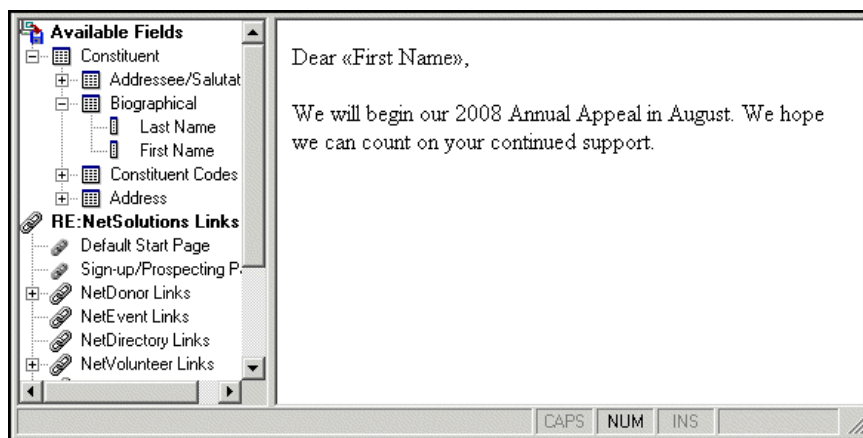
To encourage constituents to volunteer, use **NetMail** to send them an email message and include any volunteer opportunities. If you have **NetVolunteers**, you can include a link to your online job page, where they can view details about the job and even sign up.

Note: The **NetEvent Links**, **NetDirectory Links**, **NetVolunteer Links**, and **NetMember Links** tree view categories appear on the Mail screen only if you have the respective *NetSolutions* module installed.

This procedure is a continuation from the Composing your email message procedure. For more information about composing your email message, see “Composing your email message” on page 103.

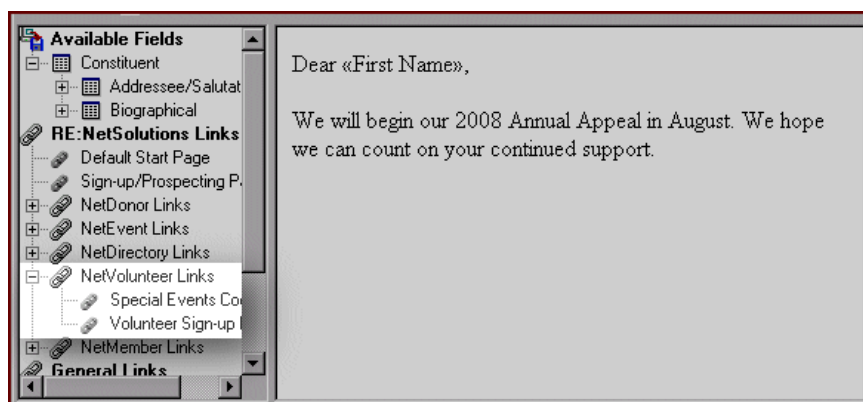
► Adding a link to your online job page

1. Open the message in which to add a job page link. For information about opening a message, see “Navigating” on page 100.

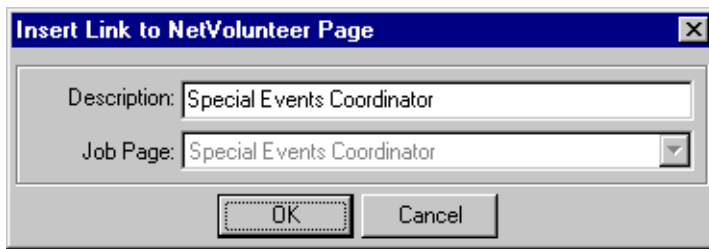


In the tree view, under the **NetSolutions Links** category, all available *NetSolutions* links appear.

2. To include a link to the online job page(s) you created in **NetVolunteers**, double-click **NetVolunteer Links** in the tree view. All available job pages and the volunteer sign up page appear under **NetVolunteer Links**.



3. Double-click the page to which you want to create a link. The Insert Link to NetVolunteer Page screen appears.



4. In the **Description** field, enter what the link will say in your message. In the previous example, the donor will click on the words “Special Events Coordinator” to access your online job page.

Note: For information about working in **NetVolunteers**, see “NetVolunteers” on page 217.

5. In the **Job Page** field, the title of the selected job’s Web page defaults.
6. Click **OK**. The new link appears in your message.



If an email recipient clicks the **Special Events Coordinator** link, they are taken to your online job page. This page is formatted based on your selections in **Configure and Customize** and **NetVolunteers**.

7. Select another category from the tree view; or click **Save and Close** to save your message and return to the NetSolutions - Net Mail screen; or select **File, Submit** from the menu bar to submit your message. For more information on submitting your message, see “Submitting an Email Message” on page 126.

Adding a Membership page Link to Your Email

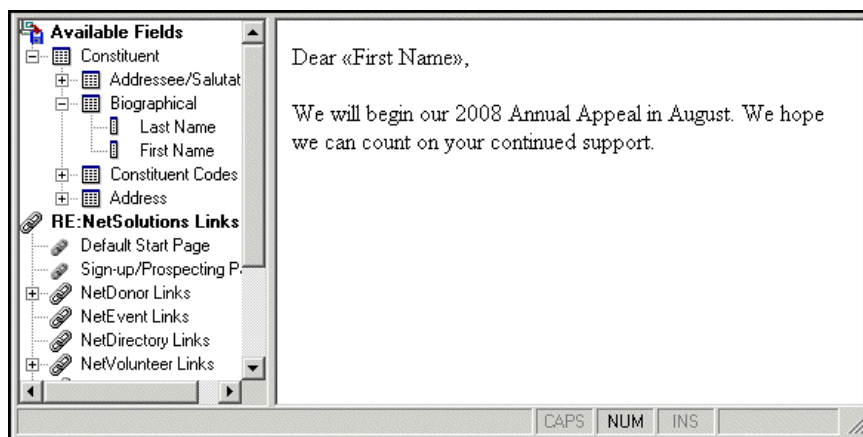
If you have a membership page created with **NetMembers**, you can encourage email recipients to visit the page and establish memberships with your organization.

Note: The **NetMember Links** tree view category appear on the Mail screen only if you have the *NetSolutions* module **NetMembers**

This procedure is a continuation from the Composing your email message procedure. For more information about composing your email message, see “Composing your email message” on page 103.

► **Adding a link to your online membership page**

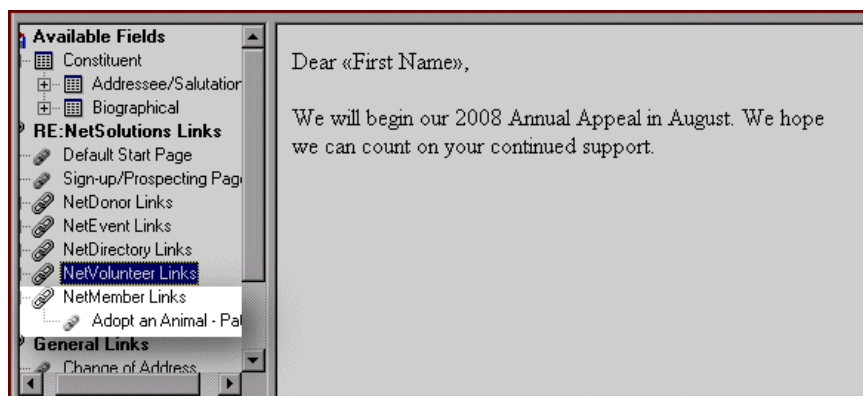
1. Open the message in which you want to add a membership page link. For information about opening a message, see “Navigating” on page 100.



In the tree view on the left, under the **NetSolutions Links** category, all available *NetSolutions* links appear, one link for each *NetSolutions* Web page you have.

Note: The **NetMember Links** tree view category appear on the Mail screen only if you have the *NetSolutions* module **NetMembers**

2. To include a link to the online membership page(s) you created in **NetMembers**, double-click **NetMember Links** in the tree view. All available membership pages appear under **NetMember Links**.



3. Double-click the membership page to which to create a link. The Insert Link to NetMember Page screen appears.

4. In the **Description** field, enter what the link will say in your message. In the previous example, the donor will click on the words “Adopt an Animal - Patron” to access your online membership page.

Note: For information about working in **NetMembers**, see “NetMembers” on page 257.

5. In the **Membership Page** field, the title of the selected membership Web page defaults.
6. Enter the **Campaign**, **Fund**, **Appeal**, or **Package** you want credited for any donation.
7. For record keeping and reporting purposes, you can keep an up-to-date count of the number of constituents sent this message by marking the **Update number solicited for this appeal** checkbox. This information may prove helpful when trying to evaluate the success of the email effort. When you download your online transactions, the **No. solicited** field on the General tab of the appeal record is updated.
8. If the email is an appeal, and your organization is in the habit of tracking appeals on constituent records, mark **Add this appeal to the constituent's record**. You can then enter the **Date** you want to appear with the appeal and any **Comment**.
9. Click **OK**. The new link appears in your message.

Adopt an Animal - Patron now!'."/>

If an email recipient clicks the **Adopt and Animal - Patron** link, they are taken to your online membership page. This page is formatted based on your selections in **Configure and Customize** and **NetMembers**.

10. On the New Mail screen, select another category from the tree view; or click **Save and Close** to save your message and return to the NetSolutions - Net Mail screen; or select **File, Submit** from the menu bar to submit your message. For more information on submitting your message, see "Submitting an Email Message" on page 126.

Including a Change of Address Link in Your Email Message

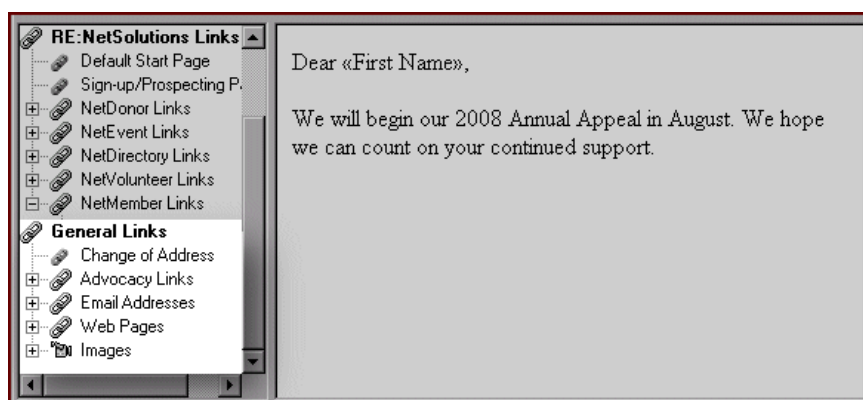
You can encourage email recipients to keep their address information current by including a link to your online change of address form. You can then download the new information, using the *NetSolutions* **Download Transactions** link.

Note: The **NetEvent Links**, **NetDirectory Links**, **NetVolunteer Links**, and **NetMember Links** tree view categories appear on the Mail screen only if you have the respective *NetSolutions* module installed.

This procedure is a continuation from the Composing your email message procedure. For more information about composing your email message, see "Composing your email message" on page 103.

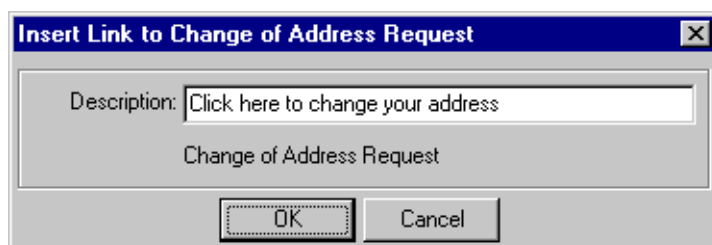
► Adding a change of address link in your email message

1. Open the message in which to add a link to your online change of address form. For information about opening a message, see "Navigating" on page 100.



In the tree view, under the **General Links** category, several general link options appear.

2. To include a link to the online change of address form, double-click **Change of Address** in the tree view. The Insert Link to Change of Address Request screen appears.



3. In the **Description** field, enter what the link will say. In the previous example, the constituent will click on the words "Click here to change your address" to access your online change of address form.

4. Click **OK**. The new link appears in your message.



If an email recipient clicks the **Click here to change your address** link, they are taken to an online address update form. Once they complete the form and submit the updated information, you can download the new address, using the **Download Transaction** link.

Note: For detailed instructions about downloading updated address information, see “Downloading Transactions” on page 295.

5. On the New Mail screen, select another category from the tree view; or click **Save and Close** to save your message and return to the NetSolutions - Net Mail screen; or select **File, Submit** from the menu bar to submit your message. For more information on submitting your message, see “Submitting an Email Message” on page 126.

Including an Advocacy Link in Your email Message

Nonprofits engage in advocacy whenever they work to change public policy. This means activities such as lobbying or partisan political activity, but it also means activities such as community organizing, working with the media, educating voters, researching, and reporting on problems facing communities, conducting voter registration and get-out-to-vote campaigns, protesting in the streets, and more.

If your organization engages in advocacy, in *The Raiser’s Edge* you can use actions with a category of **Advocacy** to record constituent actions taken in response to an action email from your organization. In addition, with *Blackbaud NetAdvocacy*, you can download advocacy action data to *The Raiser’s Edge* from *NetSolutions*.

Note: You download advocacy data into *The Raiser’s Edge* using the **Download Transactions** link in *NetSolutions*. For more information, see “Downloading Transactions” on page 295.

Blackbaud NetAdvocacy works with *Capwiz* subscription service, allowing you to include pages on your Web site where users can email influential individuals (such as Congressional, state, and local officials) to encourage their support on particular causes. When sending advocacy alert email from *NetSolutions* you can link the advocate’s actions to their *Raiser’s Edge* record once the action is complete. For information about setting up action alerts on your site using *Blackbaud NetAdvocacy* and *Capwiz*, see your *Capwiz* site control page.

Note: The **NetEvent Links**, **NetDirectory Links**, **NetVolunteer Links**, and **NetMember Links** tree view categories appear on the Mail screen only if you have the respective *NetSolutions* module installed.

This procedure is a continuation from the Composing your email message procedure. For more information about composing your email message, see “Composing your email message” on page 103.

► Adding an advocacy link in your email message

1. Open the message in which to add a link to your online advocacy page. For information about opening a message, see “Navigating” on page 100.

Warning: The **Advocacy Links** category appears in **NetMail** only if a valid password was entered on the Account Information tab in **Configure and Customize**.

In the tree view, under the **General Links** category, several general link options appear.

- To include a link to the online advocacy page, double-click **New Advocacy Link**, displayed under **Advocacy** in the tree view. The Insert Link to Advocacy Site screen appears.

Warning: Your advocacy link **Address** must include both “capwiz.com” and “?alertid” in the URL to be valid.

- In the **Description** field, enter what the link will say. In the previous example, the constituent will click on the words “Frank Domo” to access your advocacy page.
- In the **Address** field, enter the Web address for your advocacy page.
- Click **OK**. The new link appears in your message.



If an email recipient clicks the **Frank Domo** link, they are taken to your advocacy site. *NetSolutions* tracks all constituents who visit the site using this link. You can download actions for these constituents using the **Download Transaction** link.

- On the New Mail screen, select another category from the tree view; or click **Save and Close** to save your message and return to the NetSolutions - Net Mail screen; or select **File, Submit** from the menu bar to submit your message. For more information on submitting your message, see “Submitting an Email Message” on page 126.

Adding an Email Address to Your Email Message

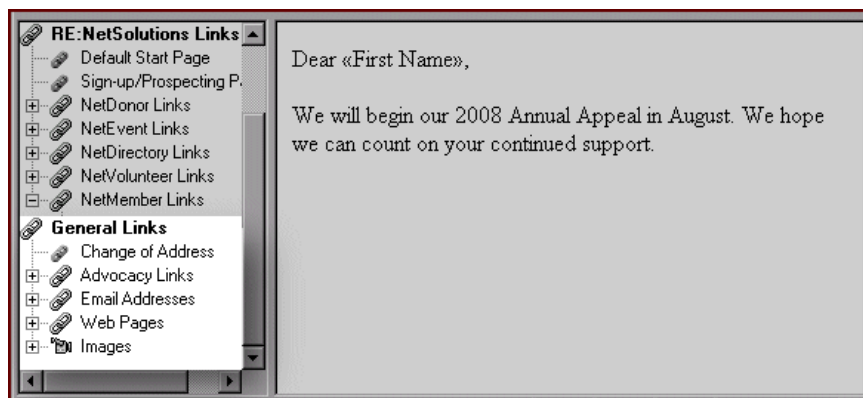
If there is a specific contact person in your organization, you can use **NetMail** and include links to the individual’s email address in your message.

Note: The **NetEvent Links**, **NetDirectory Links**, **NetVolunteer Links**, and **NetMember Links** tree view categories appear on the Mail screen only if you have the respective *NetSolutions* module installed.

This procedure is a continuation from the Composing your email message procedure. For more information about composing your email message, see “Composing your email message” on page 103.

► **Adding email addresses to your email message**

1. Open the message in which to add an email link. For information about opening a message, see “Navigating” on page 100.



In the tree view, under the **General Links** category, several general link options appear.

2. To include a link to an email address, double-click **Email Addresses** in the tree view. **New Email Addresses** appears under the **Email Address** category.
3. Double-click **New Email Addresses**. The Insert Email Address screen appears.



4. In the **Name** field, enter a name for the email address link you are including in the message. For example, in the previous example, the email recipient will click “Brenda Smathers” to bring up Brenda’s email address.
5. In the **Address** field, enter the individual’s email address.
6. Click **OK**. A link to the email address appears in your email message.



If an email recipient clicks the **Brenda Smathers** link, a blank message screen appears with Brenda's name in the **To** field.

- After you add all the email links you want to include in your message, you can select additional links in the tree view; or click **Save and Close** to save your message and return to the NetSolutions - Net Mail screen; or select **File, Submit** from the menu bar to submit your message. For more information about submitting your message, see "Submitting an email message" on page 126.

Adding links to Non-NetSolutions Web Pages

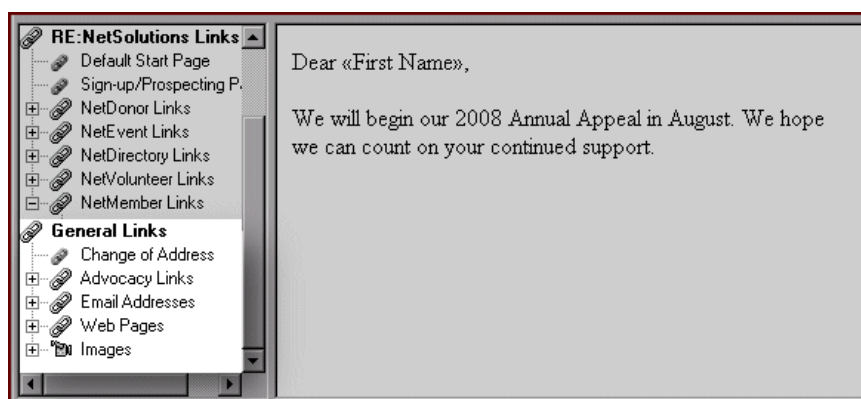
With **NetMail**, you are not restricted to including only *NetSolutions* Web page links in your message. You can also include links to Web pages hosted by your organization.

Note: The **NetEvent Links**, **NetDirectory Links**, **NetVolunteer Links**, and **NetMember Links** tree view categories appear on the Mail screen only if you have the respective *NetSolutions* module installed.

This procedure is a continuation from the Composing your email message procedure. For more information about composing your email message, see "Composing your email message" on page 103.

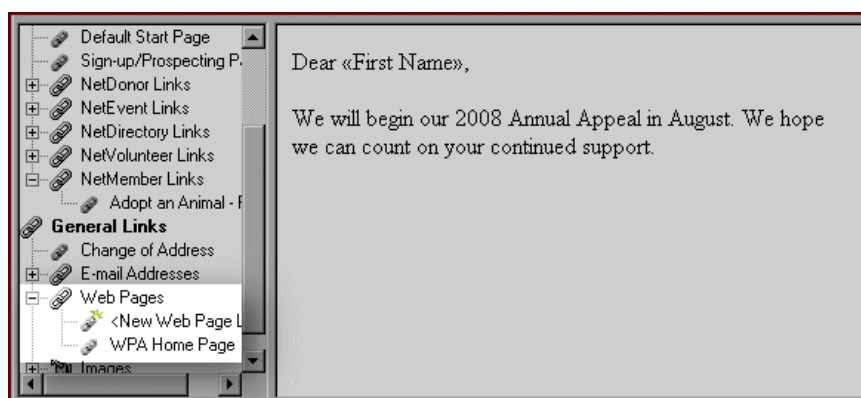
► Adding links to non-NetSolutions Web pages Not housed by NetSolutions

- Open the message in which to add a Web page link. For information about opening a message, see "Navigating" on page 100.

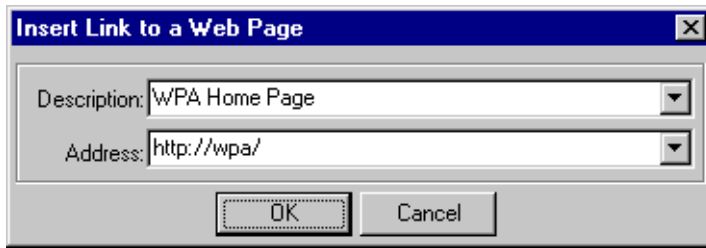


In the tree view, under the **General Links** category, several general link options appear.

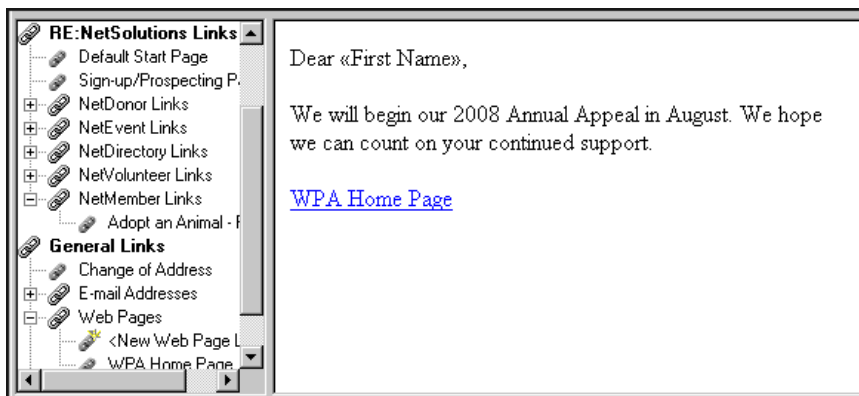
- To include a link to an non-*NetSolutions* Web page, under **General Links**, double-click the **Web Pages** category. The **New Web Page Link** option appears.



3. Double-click **New Web Page Link**. The Insert Link to a Web Page screen appears.



4. In the **Description** field, enter what the link will say in your message. In the previous example, the donor will click on the words “WPA Home Page” to access the link address.
5. In the **Address** field, enter the address of the Web page.
6. Click **OK**. A link to the Web page now appears in your message.



If an email recipient clicks the **WPA Home Page** link, they are taken to the Web page address you entered in the **Address** field.

7. After you add all the Web page links to include in your message, you can select additional links in the tree view; or click **Save and Close** to save your message and return to the NetMail screen; or select **File, Submit** from the menu bar to submit your message. For more information on submitting your message, see “Submitting an email message” on page 126.

Adding Images to Your Email

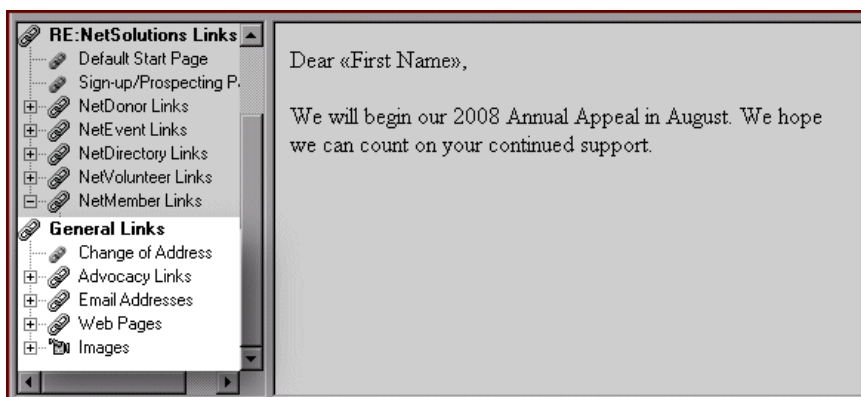
When composing an email message in **NetMail**, you can also choose to include an image or picture. The functionality allows for *.gif and *.jpg files.

Note: The **NetEvent Links**, **NetDirectory Links**, **NetVolunteer Links**, and **NetMember Links** tree view categories appear on the Mail screen only if you have the respective *NetSolutions* module installed.

This procedure is a continuation from where Composing your email message procedure ends. For more information about composing your email message, see “Composing your email message” on page 103.

► **Adding images to your email message**

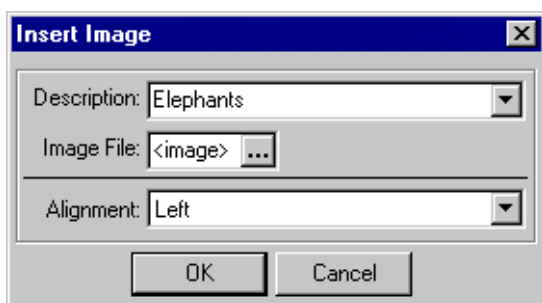
1. Open the message in which to add an image. For information about opening a message, see “Navigating” on page 100.



In the tree view, under the **General Links** category, several general link options appear.

Note: In **NetMail**, you cannot include *.pdfs in your email message. However, if you save your *.pdf as a *.jpg, you can add the image to your message.

2. To include an image in your email message, under **General Links**, double-click **Images**. The **New Image Link** appears.
3. Double-click **New Image Link**. The Insert Image screen appears.



4. In the **Description** field, enter a title for the image. This title appears under **Images** in the Tree View. This same image can be added to other messages by double-clicking on the description.
5. In the **Image File** field, click the ellipsis to access the Open screen.
Select the image file to include in your message and click **Open** to return to the Insert Image screen.
6. On the Insert Image screen, select an **Alignment**:
 - Left (Default) aligns the object to the left of the surrounding text. All preceding and subsequent text flows to the right of the object.
 - Right aligns the object to the right of the surrounding text. All subsequent text flows to the left of the object.
 - Top aligns the top of the object with the top of the text. The top of the text is the baseline plus the standard height of an ascender in the text.
 - Middle aligns the middle of the object with the surrounding text.
 - Bottom aligns the bottom of the object with the bottom of the surrounding text. The bottom is equal to the baseline minus the standard height of a descender in the text.

- Click **OK**. The image appears in your message.



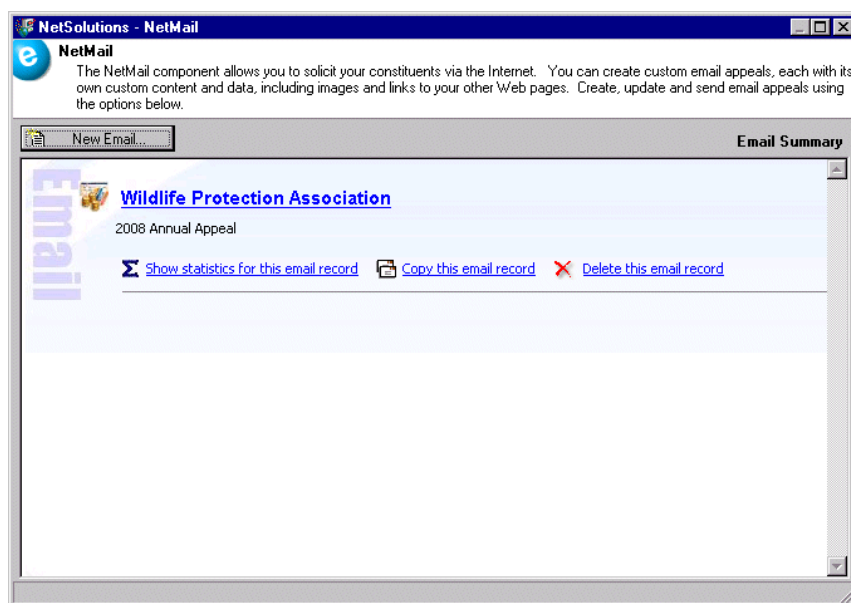
- After you add all the images to your message, you can select additional links in the tree view; or click **Save and Close** to save your message and return to the NetMail screen; or select **File, Submit** from the menu bar to submit your message. For more information on submitting your message, see “Submitting an email message” on page 126.

Submitting an Email Message

After you create the email message, you can submit the message to Blackbaud. We process the information and send the email to your constituents.

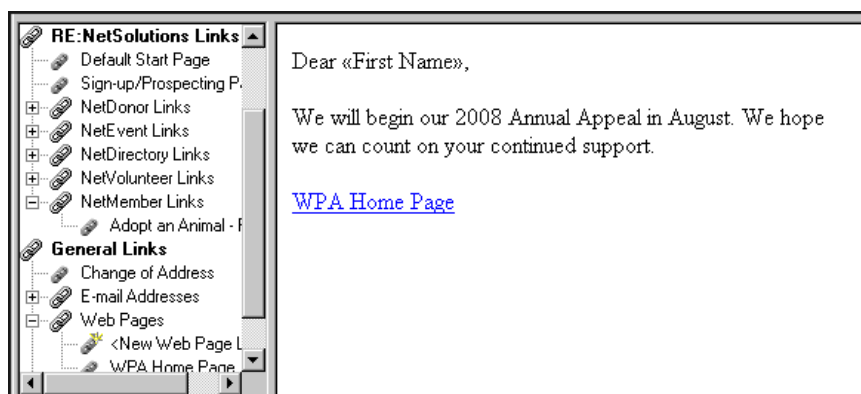
▶ Submitting an email message

- On the Raiser’s Edge bar, click **NetSolutions**. The NetSolutions page appears.
- Click **NetMail**. The NetMail screen appears.

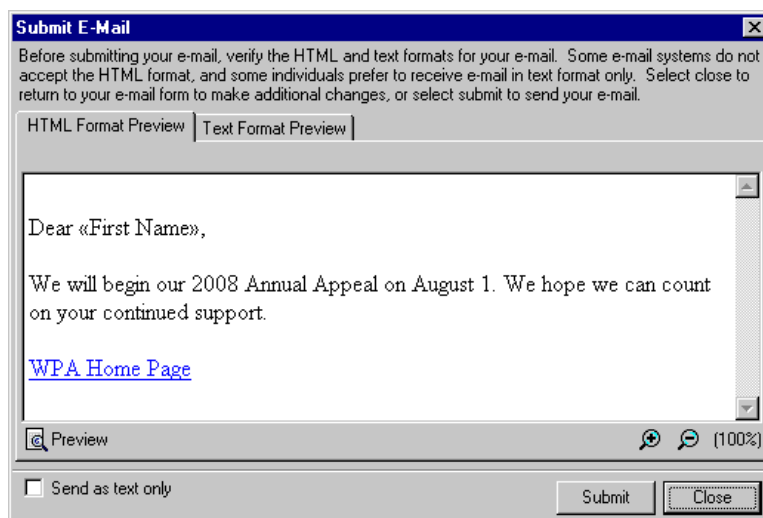


Note: For detailed instructions about how to create an email message, see “Creating a New Email File” on page 103.

3. Open an existing email file by double-clicking the link or create a new email file by clicking **New email**. The mail screen appears.



4. After you complete your email message, select **File, Submit** from the menu bar. The Submit email screen appears.

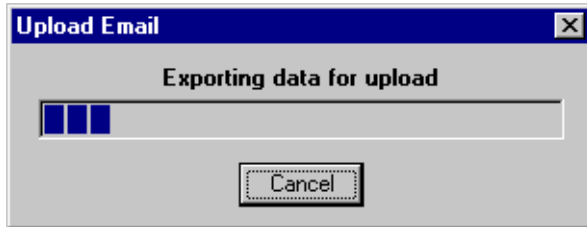


5. On the HTML Format Preview tab, you can see how your message appears on systems accepting HTML format. On the Text Format Preview tab, you can see how your message appears on systems accepting text format.
6. If most of your constituents cannot accept HTML emails, mark the **Send as text only** checkbox.
7. Click **Submit**. If when creating your email, you marked **Create static query**, the Save Static Query screen appears.

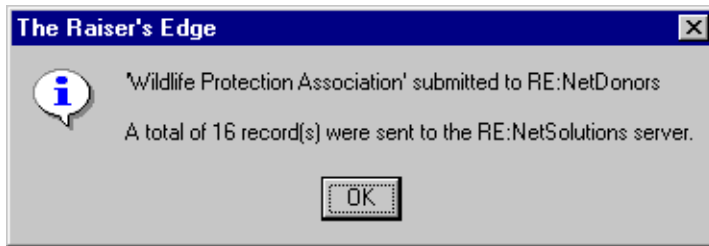
Note: For detailed instructions about how to create and effectively use queries, see the *Query and Export Guide*.

Enter a **Query name** and **Description** to help you remember the content of the query. You can mark the **Other users may execute this query** and **Other users may modify this query** checkboxes.

8. Click **Save**. The Upload Email progress bar appears.



When the upload is complete and the information is submitted, a confirmation message appears.



If for some reason an email address does not work and the message returns to Blackbaud's server, *NetSolutions* saves this information. To see which constituent email addresses failed, use the Show statistics for this email record link on the NetMail screen. To see which email addresses were rejected as undeliverable, use the **Download Transactions** link available on the NetSolutions page. For detailed instructions on downloading this information, see "Downloading Transactions" on page 295.

9. To return to the New Mail screen, click **OK**.
10. Click the "X" in the upper right corner to close the New Mail screen and return to the NetMail screen.

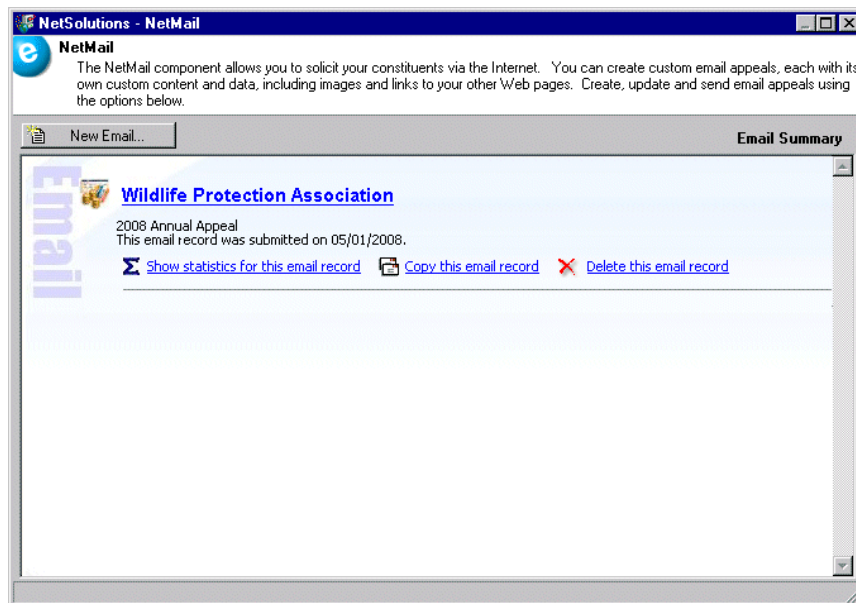
Viewing Email Statistics

On the NetMail screen, you can view important statistics about your email. You can see how many email recipients clicked a Web page link, how many recipients donated using a Web page link, the total amount generated from a Web page link, the number and types of bounced emails, as well as the number of recipients that chose to opt-out.

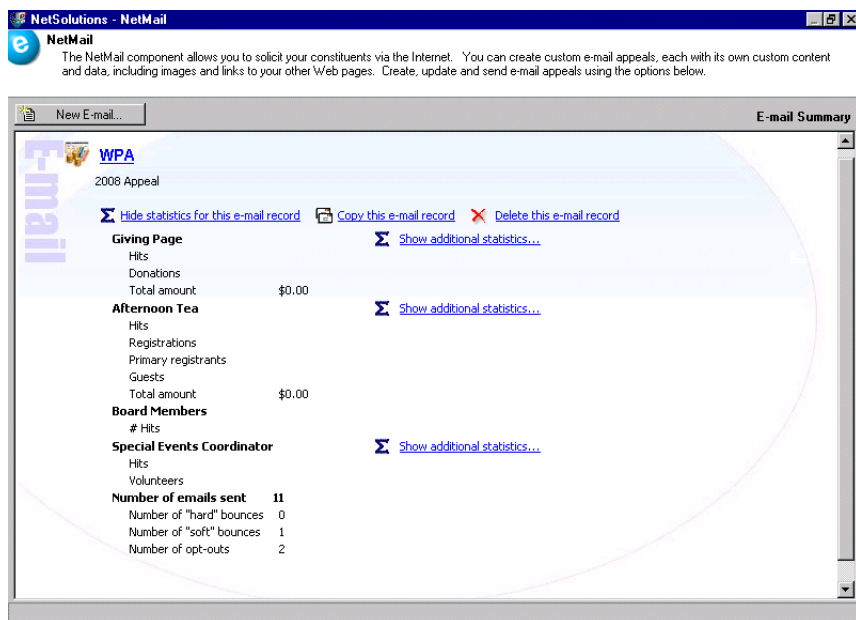
► Viewing statistics for an email

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

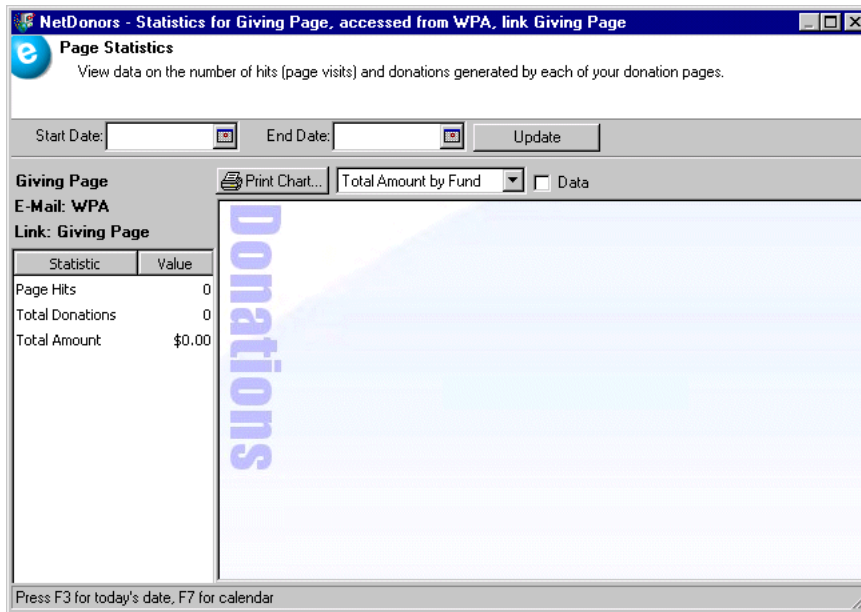
2. Click **NetMail**. The NetMail screen appears.



3. Under the email file for which you want to view statistics, click **Show statistics for this email record**. A screen appears displaying information about each link included in the email message.



4. To view more statistical information, click **Show additional statistics**. The Page Statistics screen appears.



- To see statistics for a specific period, enter a **Start Date** and **End Date**, and click **Update**.
 - Click the **Print Chart** button included above the graph to print the statistic information.
 - In the drop-down field above the chart, you can select to view Donations by Fund or Total Amount by Fund.
5. To close the screen and return to the NetMail screen, click the “X” in the upper right corner.
 6. To close the statistics display, click **Hide statistics for this email record**.
 7. To exit the NetMail screen and return to the NetSolutions page, click the “X” in the upper right corner.

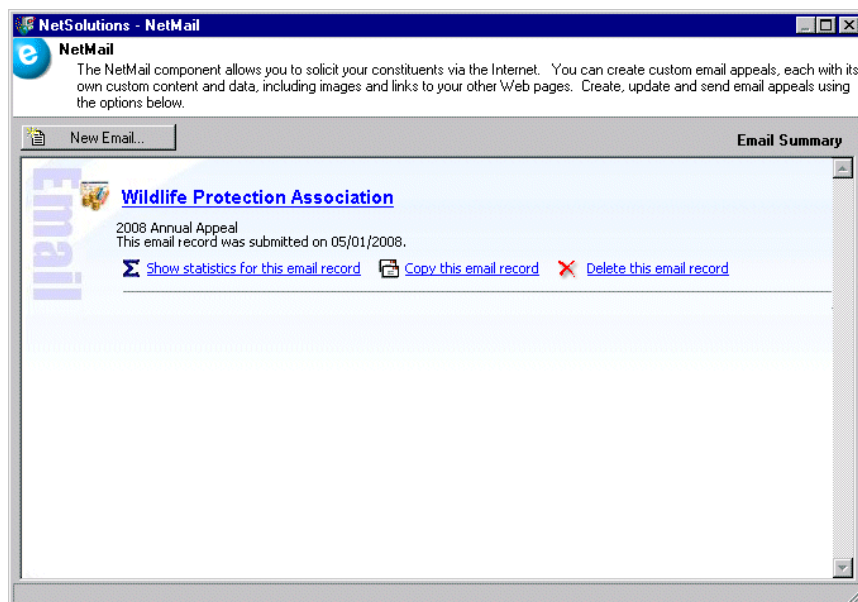
Copying an Email File

Once you create and save an email file, you can use the file as a starting point when creating new email files. For example, if you are sending out your Annual Appeal, you can open the Annual Appeal you sent last year as a copy, make the necessary changes, and save the new appeal. You then have two Annual Appeal files, the one from last year, still intact, and this year’s appeal.

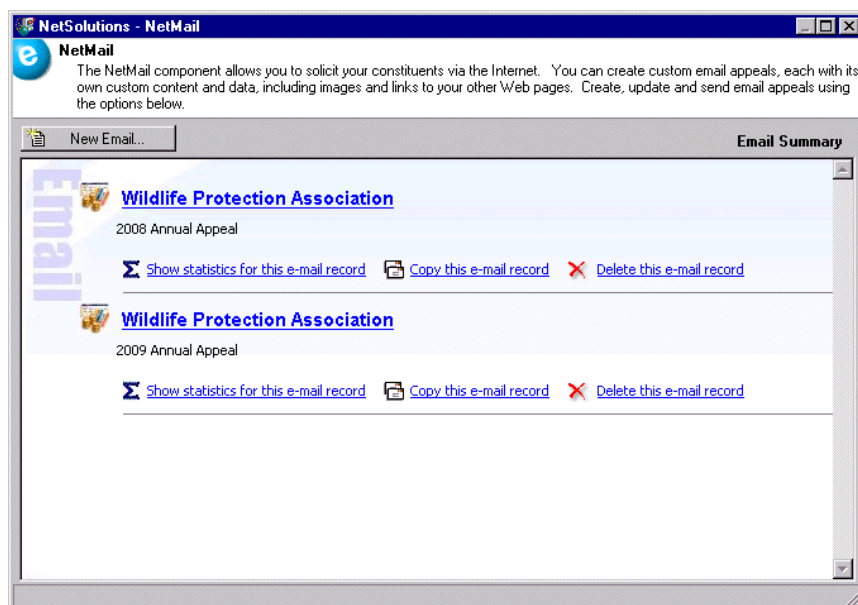
► Copying an Email

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

2. Click **NetMail**. The NetMail screen appears.



3. Under the email file you want to copy, click **Copy this email record**. A copy of the email file opens. The **Name** field is blank.
4. Enter a new **Name** for this email and make the necessary changes.
5. Click **Save and Close**. Both email files appear on the NetSolutions - NetMail screen.



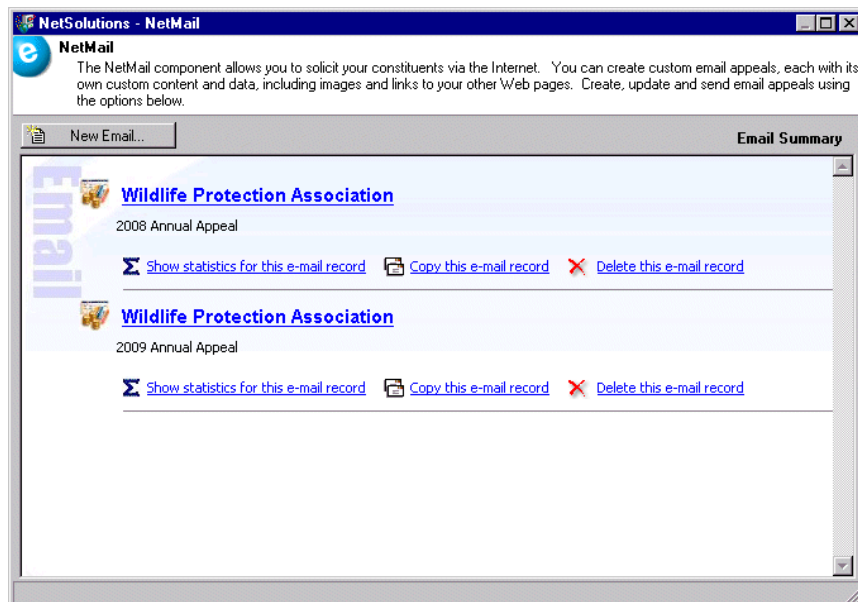
6. To exit this screen and return to the NetSolutions page, click the "X" in the upper right corner.

Deleting an Email File

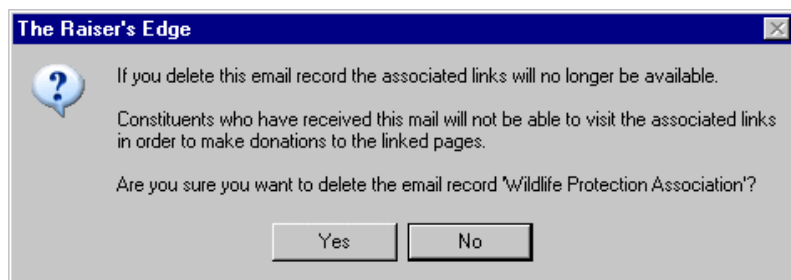
If you discover you no longer need a saved email file, you can delete it from your system.

► **Deleting an email file**

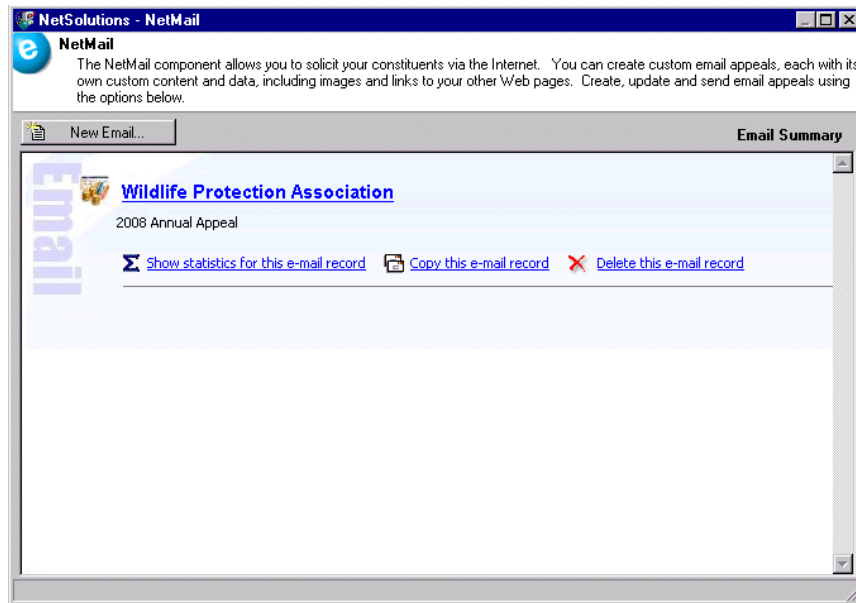
1. On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **NetMail**. The NetMail screen appears.



3. Under the email file you want to delete, click **Delete this email record**. A warning message appears.



4. To permanently delete the record, click **Yes**. You return to the NetSolutions - NetMail screen.



5. To exit this screen and return to the NetSolutions page, click the "X" in the upper right corner.

NetEvents

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Warning: Before you start working in **NetEvents**, you must register as a *NetSolutions* user and enter your **Login ID** and **Login Password** in **Configure and Customize**. For more information, see “Registering with *NetSolutions*” on page 1 and “Configure & Customize” on page 11.

With **NetEvents**, you can publicize upcoming events, such as golf tournaments, dances, and dinners using your Web site. You can publish the event information one of two ways.

First, you can publish information about the event. No online registration link is provided. Second, you can publish event information pages that include the ability for users to register online.

If, while visiting your event Web page, visitors enter any information — complete the constituent registration form or register for an event — you can download this information to *The Raiser’s Edge*, using the **Download Transactions** link. You can then generate batch entries for the downloaded information and commit the new information to records in *The Raiser’s Edge*.

If you offer online event registration, you must define pricing units for the event in *The Raiser’s Edge*. If you fail to define pricing units when you create the event record, you can access the event record from **NetEvents** and add the pricing information. You cannot, however, add pricing units in **NetEvents**.

Note: **NetEvents** does not support multiple sign-up pages for each event. An event record can be published only once.

Although Blackbaud hosts your event Web page, you control the page design. Through **Configure and Customize** and **NetEvents**, you can select page and font colors, add images, include titles and descriptions, and much more. For information about **Configure and Customize**, see “Configure & Customize” on page 11.

System Requirements

To use **NetEvents**, you must have the following:

- A Web page
- *Internet Explorer* 5.x or higher is fully supported; however donors can use HTML 3.2 compliant browsers as well
- Event Management

Interacting with The Raiser’s Edge

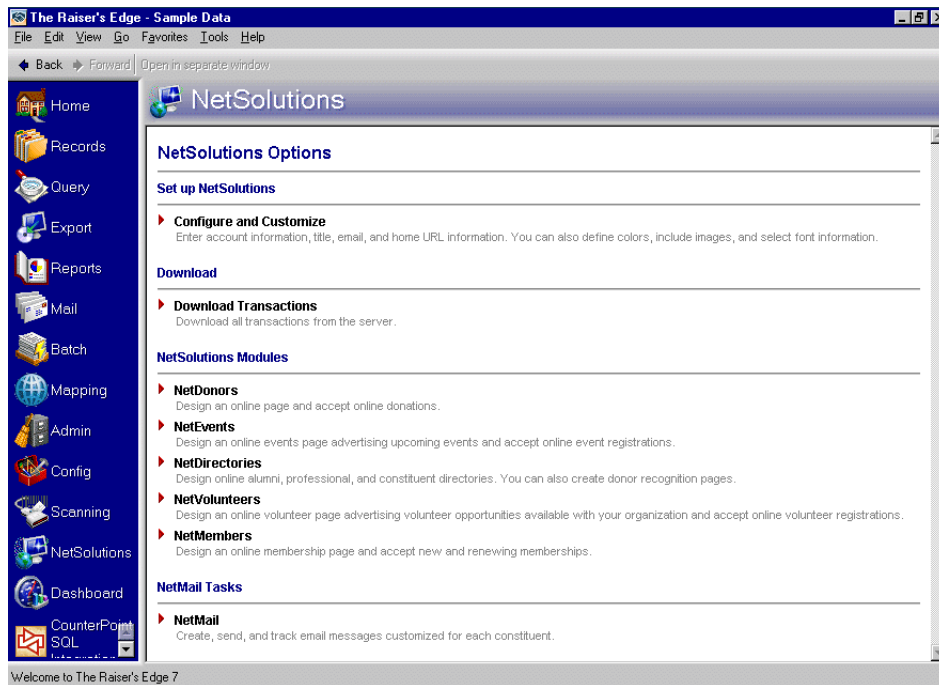
Using **NetEvents** in conjunction with *The Raiser’s Edge* saves your organization hours in data entry time. The **Download Transactions** link included with *NetSolutions* automatically links all event registration information to the appropriate *Raiser’s Edge* records. For example, if a constituent registers online for an event, with **Download Transactions** the constituent is added as an event participant on the Participant tab of the event record in *The Raiser’s Edge*. Any guests entered by the constituent are added as guests of the participant on the Participant tab of the event record. The gift generated by the registration transaction is entered as a gift record and linked to the participant record. The registration fees are added to Registration Fees tab of the participant record.

Also, the online information is included in the standard *Raiser’s Edge* reports, queries, and exports regardless of whether the information is added through the automatic download facility or entered manually.

Navigating

Note: Before you can access **NetEvents**, you must register for *NetSolutions* with Blackbaud. Also, you must click **Configure and Customize** and enter your login information.

In *The Raiser's Edge*, you access **NetEvents** by clicking **NetSolutions** on the Raiser's Edge bar.



Accessing NetEvents

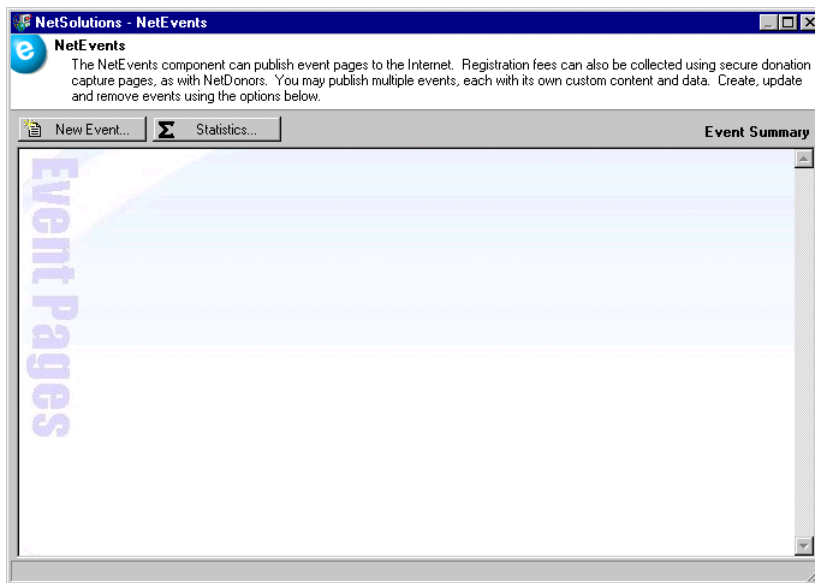
Multiple users can access different areas of *NetSolutions* simultaneously.

For more information, see the Security chapter in the *Configuration & Security Guide*.

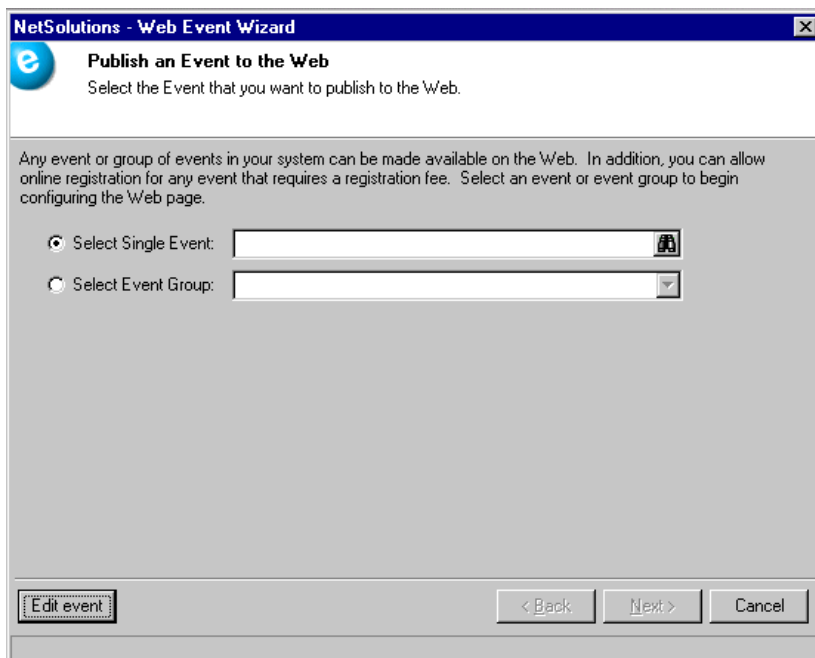
► Accessing NetEvents

1. On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **NetEvents**. The NetSolutions - NetEvents screen appears.

The first time you open the link, this screen appears blank. Once you create and save an **NetEvents** file, a link to the saved file appears.

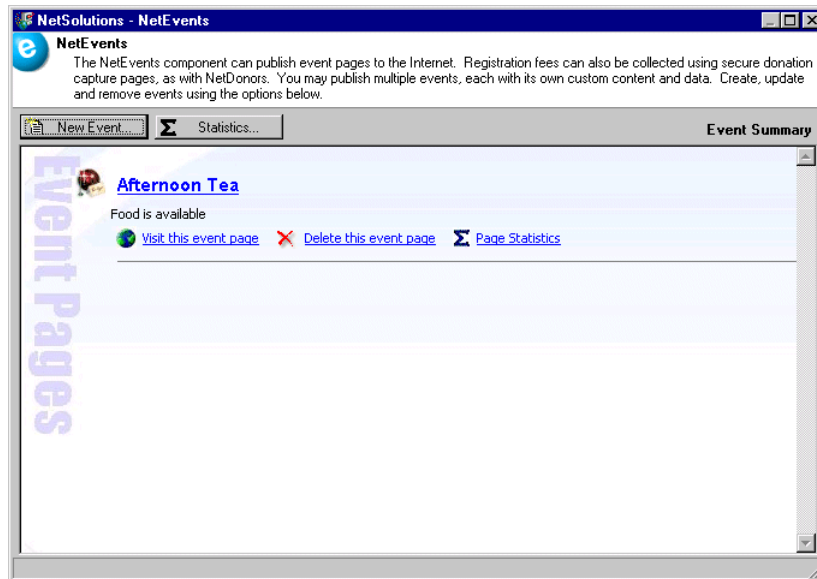


3. To create an online event Web page, click **New Event**. The Web Event Wizard screen appears.



For information about publishing an event to your Web site, see "Publishing an Event to Your Web Site" on page 140.

4. After you enter and save an online event, it appears as a link on the NetSolutions - NetEvents screen.



5. To open the event, click the link — **Afternoon Tea**.
6. To see how the Web page looks, click **Visit this event page**.
7. To delete the event Web page, click **Delete this event page**.
8. To view a statistical overview of an event page, click **Page Statistics** under the event page to access the information.
9. To view a statistical overview of all of your event pages, click **Statistics**.
10. To exit this screen, click the “X” in the upper right corner. You return to the NetSolutions page.

Buttons

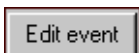
Three buttons to help you navigate through **NetEvents**.



The **New Event** button on the NetSolutions - NetEvents screen opens the Web Event Wizard, where you enter information for a new online event.



The **Statistics** button on the NetSolutions - NetEvents screen, charts the number of online registrants and online fees collected from your online event pages.



The **Edit event** button on the Web Event Wizard screen opens the event record in *The Raiser's Edge*. You can then make any necessary changes to the event before publishing it to your Web site.

Publishing an Event to Your Web Site

With **NetEvents**, you can take event information from *The Raiser's Edge* and make it available on your Web site. You can also choose to publish a single event or a group of events that you have specified and give your visitors an online registration option. The events Web page is hosted by Blackbaud but formatted based on your selections in **Configure and Customize** and the Web Event Wizard. For more information about **Configure and Customize**, see "Configure & Customize" on page 11.

Publish an Event to the Web

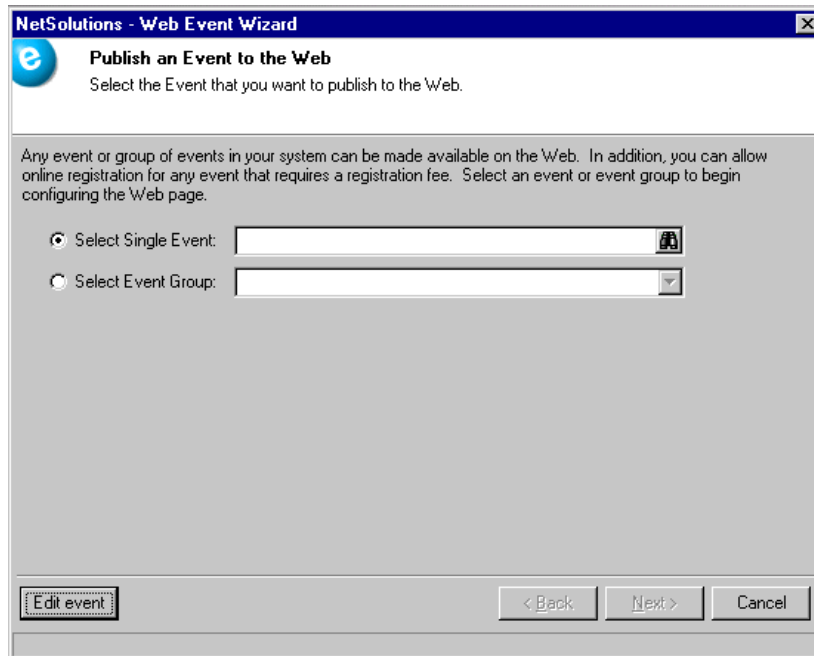
On the Publish an Event to the Web screen, you select the *Raiser's Edge* event record to publish on your Web site.

► Completing the The Publish an Event to the Web screen

1. On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **NetEvents**. The NetSolutions - NetEvents page appears.



3. Click **New Event**. The Web Event Wizard appears.



NetSolutions - Web Event Wizard

Publish an Event to the Web
Select the Event that you want to publish to the Web.

Any event or group of events in your system can be made available on the Web. In addition, you can allow online registration for any event that requires a registration fee. Select an event or event group to begin configuring the Web page.

☒ Select Single Event: 

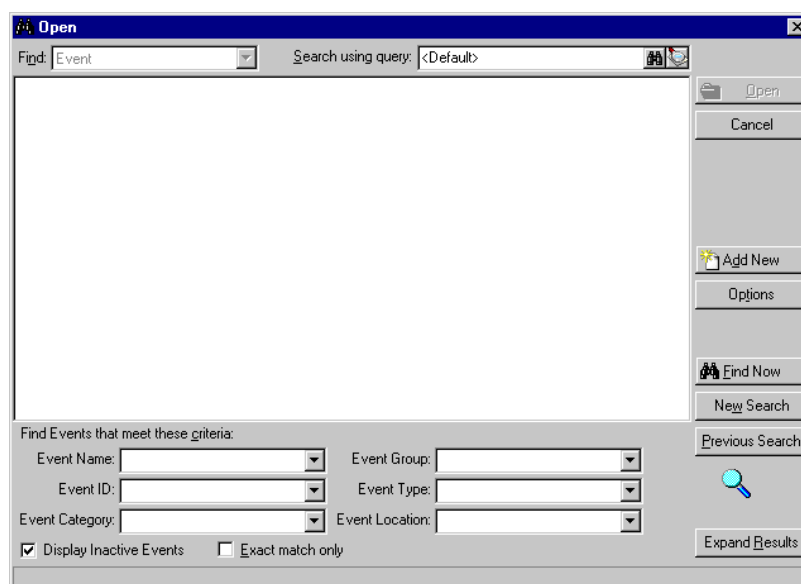
☐ Select Event Group:

On the Publish an Event to the Web screen, select either a single event or an event group record from **The Raiser's Edge** to place on your Web page.

4. To select a single event, select **Select Single Event**. To select the record, click the binoculars. The Open screen for events appears.

Note: For information about defining groups of events in **The Raiser's Edge**, see the Multiple Registrations for Grouped Events chapter of the *Event Management Data Entry Guide*.

- a. In the **Find Events that meet these criteria** frame, enter criteria, narrowing the event search, and click **Find Now**. All event records satisfying the criteria appear in the grid.



Open

Find: Search using query:

Find Events that meet these criteria:

Event Name: Event Group:
 Event ID: Event Type:
 Event Category: Event Location:

☒ Display Inactive Events ☐ Exact match only

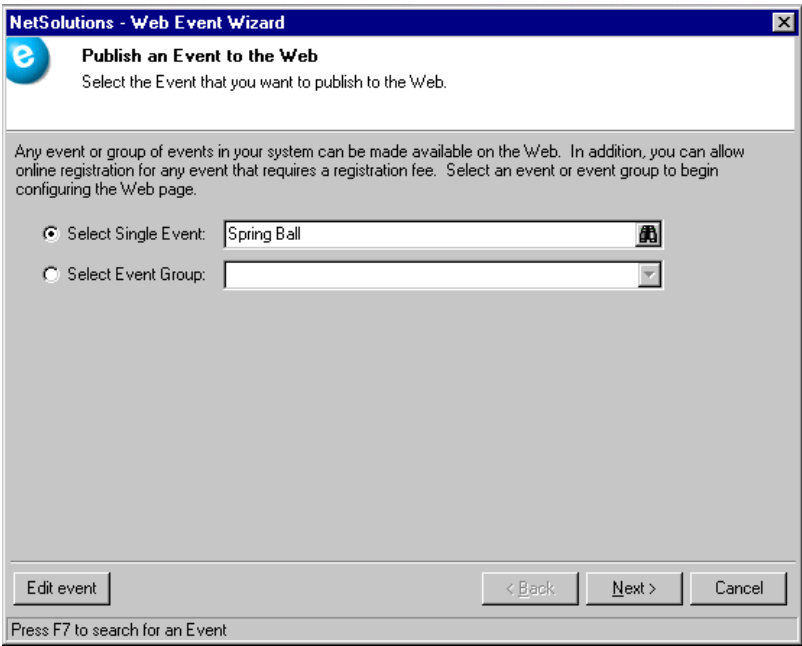
- b. You can select an existing record, and click **Open**.

Or

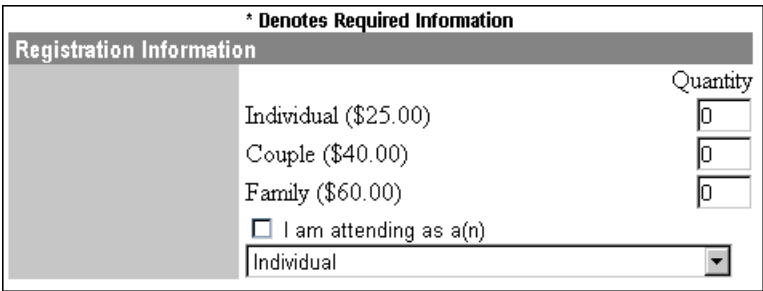
Note: For information about creating and working with event records, see the *Event Management Data Entry Guide*.

You can select **Add New** to create a new event record.

Once an event is selected or created, it appears in the **Select Event** field on the Web Event Wizard screen.



This is what registrants for a single event see.



5. To select an event group, select **Select Event Group**. To select an event group record, click the down arrow and select the group from the drop down menu.

This is what registrants for a multiple event group will see.

*** Denotes Required Information**

Registration Information

Afternoon Tea

Adult (\$75.00)	Quantity
	0
Child (\$50.00)	0
☐ I am attending as a(n)	
Adult	

Alta Tennis Tournament

Single - One Ticket (\$100.00)	Quantity
	0
Double - Two Tickets (\$175.00)	0
Family - Four Tickets (\$250.00)	0
☐ I am attending as a(n)	
Single - One Ticket	

Starlight Concert

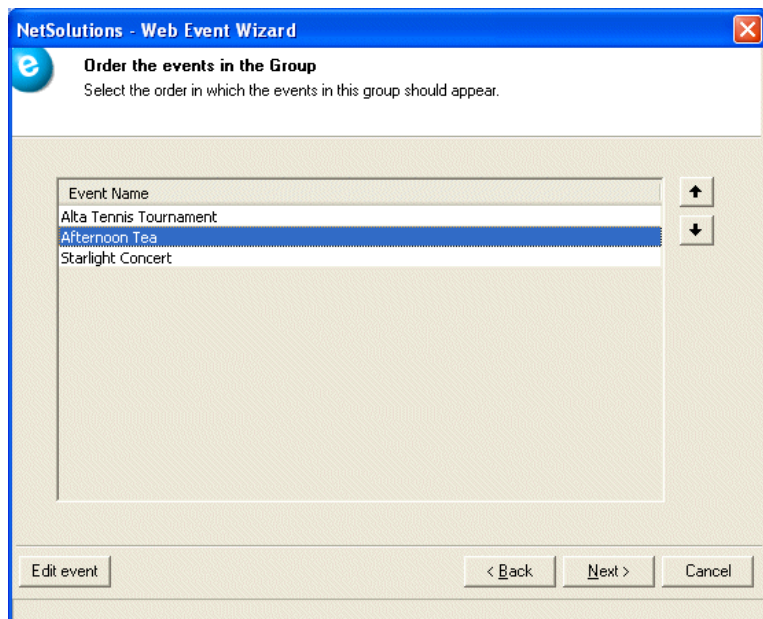
Adult (\$15.00)	Quantity
	0
Child (\$10.00)	0
☐ I am attending as a(n)	
Adult	

Warning: If you click **Cancel**, any information you entered in the Web Event Wizard is lost.

- Click **Next** and move to the Allow Online Registration? screen, or click **Cancel** to return to the NetSolutions - NetEvents page.

Order Events in Group

On the Order events in a group page, you can select the order in which you want your group of events to appear on your Web page. This screen appears if you select the **Select Event Group** on the Publish an Event to the Web page.



All events included in the selected group appear in the **Event Name** grid. Use the up and down arrows to the right of the grid to arrange the events.

Allow Online Registration?

On the Allow online registration? page, you can allow visitors to your Web page to register for an event online. You can limit the number of online registrations, select a constituent code to use when creating a constituent record, and allow registrants to make comments when they pay their registration fees.

► **Completing the Allow online registration? screen**

1. Once you complete the Publish an Event to the Web screen, click **Next**. The Allow online registration? screen appears.

2. To include a registration link on the event Web page, mark **Allow participants to register online**. This is what your registrants see.

[Click here to register for this event](#)

3. To include a space for comments on the event Web page, mark **Allow registrants to enter comments with their registration fee**. A **Comments** field is included at the bottom of the **Payment Information** frame on your Web page. This checkbox is enabled only if you mark **Allow participants to register online**.

This is what your registrants see.

4. On the Allow online registration? screen, to limit the number of online registrants, mark **Limit the maximum number of participants that can register online** and enter a number in the box next to (maximum participants).
5. In the **Select a constituent code to use when creating a constituent record** field, select the constituent code to assign online registrants who are not already constituents in your database. This code is then assigned any new constituents downloaded from this Web page. It is added to the Bio 2 tab of the constituent record.

Warning: If you click **Cancel**, any information you entered in the Web Event Wizard is lost.

6. Click **Next** and move to the Allow Additional Donations? screen, if you marked **Allow participants to register online**. Otherwise, move to the Event Description screen. Or click **Cancel** to return to the NetSolutions - NetEvents page. For information about completing the Event Description screen, see page 149.

Allow Additional Donations?

On the Allow additional donations? screen, you can give users of your Web site the option of donating money in addition to the event registration fees.

► Completing the Allow additional donations screen

Note: If you did NOT mark the **Allow participants to register online** on the Allow online registration screen, skip to “Event Description” on page 149.

1. Once you complete the Allow online registration? screen, if you marked **Allow participants to register online**, the Allow additional donations? screen appears when you click **Next**.

2. Mark **Allow registrants to make an additional donation on this page** to allow online registrants to make additional donations. The **Additional Donation Text** field will become available.

3. In the **Additional Donation Text** field, enter the text to appear in the **Additional Donation** frame. An **Additional Donation** frame with the text you entered will be added to your NetEvents registration Web site. There is 255 character limitation.

This is what your registrant will see:

Additional Donation

While you register for this event, please consider making an additional contribution to our organization.

Amount \$

Warning: If you click **Cancel**, any information you entered in the Web Event Wizard is lost.

4. Click **Next** and move to the Prices for the Event screen, or click **Cancel** to return to the NetSolutions - NetEvents page.

Prices for the Event

On the Prices for the event screen, you must enter the number of participants for each pricing unit. You can also enter a description for the pricing unit. Pricing unit information is added from the Prices tab of the event record. To open the event record from the Prices for the event screen, click the **Edit event** button at the bottom of the screen. The selected event record must have at least one pricing unit for users to use the online registration feature.

► Completing the Prices for the event screen

Note: If you did not mark the **Allow participants to register online** on the Allow online registration screen, skip to “Event Description” on page 149.

1. Once you complete the Allow additional donations screen, if you marked **Allow participants to register online**, the Prices for the event screen appears when you click **Next**.

NetSolutions - Web Event Wizard

Prices for the event
This step determines which prices will appear on the registration page for this Event.

Enter the number of participants for each pricing unit and the description as you want it to appear on the registration page. You must have at least one pricing unit to use the online registration feature. Pricing units can be added or changed for this event by clicking the Edit event button and accessing the Prices tab.

Unit	Price (Gift Amount)	Receipt Amount	Participants/Unit	Description	Publish?
Individual	\$25.00	\$15.00	1		☒
Couple	\$40.00	\$25.00	2		☒
Corporate Spo...	\$500.00	\$350.00	10		☒

☒ Registration fees will be collected for this event
☒ Allow registration fees to be paid anonymously

Enter the fund to use when creating registration fee gifts: 2008 Annual Fund

Edit event **< Back** **Next >** **Cancel**

The entries that appear in the **Unit**, **Price (Gift Amount)**, and **Receipt Amount** columns are based on information entered on the Prices tab of the event record in *The Raiser's Edge*.

If you chose to publish an Event Group, an **Event** column appears, indicating the individual event each entry belongs to.

To edit or add information to these columns, you must do so from the event record. To access the event record, click **Edit event**. For more information about working in event records, see the *Event Management Data Entry Guide*.

2. In the **Participants/Units** column, you must enter the number of participants. For instance, the "Individual" unit in the preceding step represents one participant, while the "Corporate Sponsor" unit represents 10.
3. In the **Description** column, enter the unit description to appear on the event Web page. If you leave the **Description** column blank, the entries in the **Unit** column appear on the Web page.

Note: For the registrant, each registration purchased is equal to one specified Unit. So if one Unit is specified to equal 10 participants and a registrant purchases two Units, they will pay to register 20 participants total.

This is what your registrants see. They select the number of registrations to purchase by entering the number next to each defined Unit. In addition, they can choose to designate themselves as one of the purchased registrations by marking the **I am attending as a(n)** checkbox and selecting the unit for which they would like to be counted.

4. In the **Publish?** column, mark the checkbox for price points that will be available on the resulting event registration page. Only events with at least one published price will appear on the registration page. At least one price must be published to continue through the wizard. The default is checked.
5. On the Prices for the event screen, the program assumes **Registration fees will be collected for this event**, and this checkbox defaults to marked. If you are not collecting registration fees for this event, unmark the checkbox. The **Enter the fund to use when creating registration fee gifts** field is then disabled.
6. If **Registration fees will be collected for this event** is marked, you must select a fund in the **Enter the fund to use when creating registration fee gifts** field. This fund is credited with any online registration fees collected for this event when you download the online information to *The Raiser's Edge*.
7. If **Allow registration fees to be paid anonymously** is marked, registrants can pay their fees anonymously. A checkbox to donate anonymously appears on the registration page.

This is what your registrant sees:

Warning: If you click **Cancel**, any information you entered in the Web Event Wizard is lost.

8. Click **Next** and move to the Event Description screen, or click **Cancel** to return to the NetSolutions - NetEvents page.

Event Description

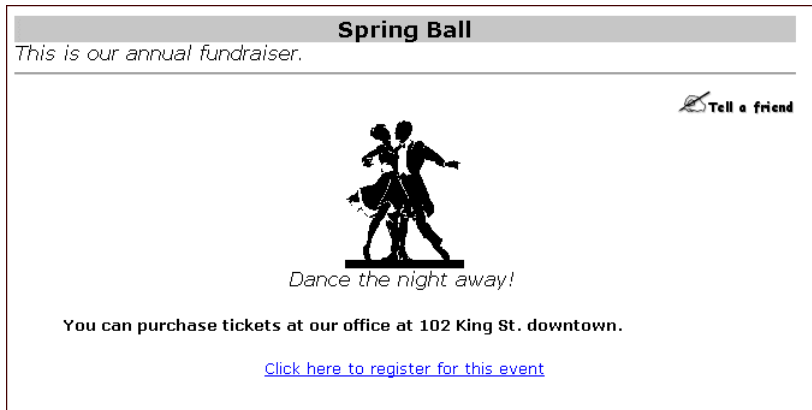
On the Event Description screen, you can enter information about your event, such as the event name, description, and any details you want visitors to your Web page to know. You can also select an image and a caption to include on the page.

► Event description screen

1. Once you complete the Allow online registration or the Prices for the event screen, click **Next**. The Event description screen appears.

2. Enter an **Event Name**. The event record name defaults because you selected the event on the Publish an Event to the Web screen, but you can change the name on this screen. The name appears at the top of your event Web page, under the **Title** information you entered in **Configure and Customize**.
3. Enter a **Description** of the event. This appears under the **Event Name**. There is a 1,024 character limit.
4. In the **Details** box, enter any additional event information. For example, you can enter ticketing information. There is a 2,147,483,647 character limitation.
5. In the first **Image/Caption** field you can include an image on your event Web page. Click the ellipsis to access the Open screen.
Select the image file to include on the event Web page, and click **Open** to return to Web Event Wizard screen.
6. In the second **Image/Caption** field, you can enter a caption to appear under the image.

7. In **Configure and Customize** you design a **Tell a Friend** link, which appears on your Web pages. The link takes visitors to another page, where they can enter contact information about their friend. If you do not want this link to appear on your event page, unmark the **Display Tell a Friend** checkbox. Keep the checkbox marked if you want the link to appear on your event page.
8. To see how the information you added on this screen appears on the event Web page, click **Preview**.
This is what your registrants see.



Warning: If you click **Cancel**, any information you entered in the Web Event Wizard is lost.

9. Click **Next** and move to the Page Style screen, or click **Cancel** to return to the NetSolutions - NetEvents page.

Page Style

Using the Page Style screen, you can give your event pages a unique look, setting it apart from your other *NetSolutions* pages. The style you established in **Configure and Customize** defaults to all your *NetSolutions* Web pages, but you can change the style for each event page using the Page Style screen. The fields and checkboxes available on this screen change based on the **Page section** you select. You can change the background, logo and title, image, header, detail, body, table legend, table headers, table text, and error text styles.

For more information, see “Changing Page Style” on page 387.

Warning: If you click **Cancel**, any information you entered in the Web Event Wizard is lost.

If you are happy with the page style you established in **Configure and Customize**, do not make any changes on this screen, and click **Next** to move to the Customize the Event Confirmation screen, or the Publish the Event screen depending upon your earlier choices. Or click **Cancel** to return to the NetSolutions - NetEvents page.

For information, on the Publish the Event screen, see “Publish the Event” on page 156.

Customize the Event Confirmation

With **NetEvents**, you can customize registration confirmation messages automatically sent via email to your online registrants. For more information, see “Customizing Confirmations” on page 367.

Warning: If you click **Cancel**, any information you entered in the Web Event Wizard is lost.

When you are satisfied with your confirmation letter, click **Next** to move to the Sources screen or click **Cancel** to return to the NetSolutions - NetEvents page.

Sources

Including source options on your event page lets you know what attracted registrants to your Web site. For instance, in the following example, the Wildlife Protection Association included “Visiting Web Site” and “Mailing” as source options. They also attached each source option to a **Raiser’s Edge** appeal. So, whenever a registrant selects one of the source options, the corresponding appeal is credited with the registration fee.

► Completing the Sources screen

1. Once you complete the Customize the event confirmation screen, click **Next**. The Sources screen appears.

NetSolutions - Web Event Wizard

Sources

When you want registrants to indicate how they heard about your site, enter each source as it should appear on the event page. Beside each source, enter the appeal associated with it. Optionally, you can select an appeal to use if the registrant does not indicate a source.

Source header:

Online Source	Appeal to Credit

If no source is specified use this appeal:

If you include sources on your event page, you can keep track of what draws registrants to your Web site. You can also credit appeal records for any fees.

2. In the **Source header** field, enter a heading for the online source section of your Web page. There is a 255 character limitation.
3. In the **Online Source** column, enter the options to appear on your Web page. In the following example, the Wildlife Protection Association included “Visiting Web Site” and “Mailing” as source options.
4. In the **Appeal to Credit** column, enter the appeal credited with fees/donations associated with the source.

5. In the **If no source is specified use this appeal** field, select a default appeal to use should the donor not select a source. For instance, in the following example, registrants have two source options to select when registering online: “Visiting Web Site” or “Mailing”. If they select “Visiting Web Site” the “Internet/Web Site solicitations” appeal is credited for the donation; if they select “Mailing” the “Direct Mailing” appeal is credited for the donation. If no source is selected, the “Internet/Web Site solicitations” appeal is credited for the donation.

NetSolutions - Web Event Wizard

Sources

When you want registrants to indicate how they heard about your site, enter each source as it should appear on the event page. Beside each source, enter the appeal associated with it. Optionally, you can select an appeal to use if the registrant does not indicate a source.

Source header: How did you hear about us?

Online Source	Appeal to Credit
Visiting Web site	Internet/Web Site solicitations
Mailing	Direct Mailing

If no source is specified use this appeal: Internet/Web Site solicitations

Edit event < Back Next > Cancel

Press F7 for appeal search screen

Information entered in the example above appears as a drop-down menu at the bottom of your registration page.

This is what your online donor sees.

How did you hear about us?

Source

- Visiting Web Site
- Mailing

Warning: If you click **Cancel**, any information you entered in the Web Event Wizard is lost.

6. Click **Next** and move to the Event Profiling screen, or click **Cancel** to return to the NetSolutions - NetEvents page.

Event Profiling

Event profiling allows you to include questions on your event page to gather additional information from registrants. These questions can help you segment, target, and cultivate your constituency. On the Event Profiling screen, you can enter profiling question specific to this event. The default donor profiling information, used for all **NetSolutions** functions, is entered in **Configure and Customize**.

► **Adding event profiling information for your event page**

1. Once you complete the Sources screen, click **Next**. A screen appears in which to enter event profiling questions for this event page.

NetSolutions - Web Event Wizard

e Event profiling
Use Event Profiling questions to gather additional information from your Web users that will help segment, target, and cultivate your constituency.

Profiling Question	Attribute to Use
Did you receive our mailing?	Mailing

Press F7 for appeal search screen

On this screen, you can enter questions to appear on your event page. The questions can help you better understand your donors.

- For example, in the **Donor Profiling Question** column, you can ask the question “Did you receive our event booklet?”. This question then appears at the end of the donor registration page. The question is limited to 120 characters.

* Denotes Required Information

Registration Information

Title

First Name

Last Name*

Address*

City, State ZIP* ,

Country*

Phone

Fax

E-mail*

☒ I wish to receive future e-mail correspondence.

☐ I prefer to make my donations anonymously.

Additional Information

☐ Did you receive our event booklet?

Continue >

Note: Only yes/no constituent attributes appear in the **Attribute to Use** column.

- In the **Attribute to Use** column, you must assign the question to a constituent attribute in your database. In the example above, if the registrant marks **Did you get our mailing?** on the event page, the information appears on the Attributes tab of the constituent record.

On the constituent record, “Mailing” appears in the **Category** column and “Yes” appears in the **Description** column.

- From the Donation Page Wizard screen, click **Next** and move to a screen where you can enter new merchant account information, or click **Cancel** to return to the NetSolutions - NetDonors page.

Warning: If you click **Cancel**, any information you entered in the Web Event Wizard is lost.

- Click **Next** and move to the Additional Links screen, or click **Cancel** to return to the NetSolutions - NetEvents page.

Additional Links

From the Additional Links screen, you can add links to related Web pages. For example, you can add a link to a detailed explanation of your privacy policy.

► **Adding links to your online event page**

1. Once you complete the Donor Profiling screen, click **Next**. A screen appears to add links to your event page.

Image	Caption	URL
<image>	A detailed explanation of our privacy policy.	http://privacy_matters

2. In the **Image** column, you must map to an image to use as the hyperlink on your event page.
3. In the **Caption** column, enter the text visitors see when they hover their mouse over the hyperlink image.
4. In the **URL** column, enter the address of the Web page to which you are adding a link. The column accepts the URL with or without the <http://.
5. The **Path** column displays the location of the **Image** you selected.

Warning: If you click **Cancel**, any information you entered in the Web Event Wizard is lost.

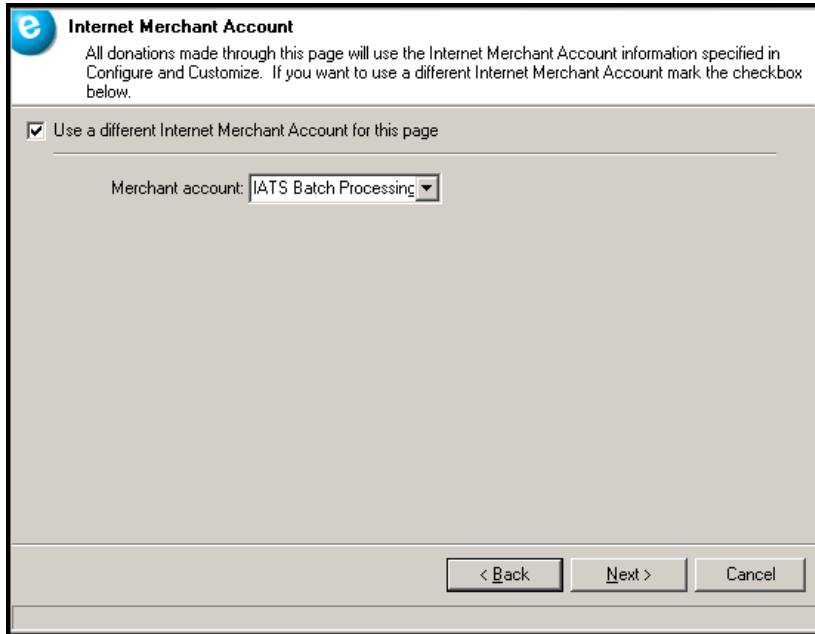
6. Click **Next** and move to the Internet Merchant Account screen, or click **Cancel** to return to the NetSolutions page.

Internet Merchant Account

On the Internet Merchant Account screen, you can change the Internet merchant account to use for this event Web page. The default internet merchant account, used for all *NetSolutions* functions, is entered in **Configure and Customize**.

► **Changing event Internet merchant account information**

1. Once you complete the Additional Links screen, click **Next**. A screen appears so you can enter a different Internet merchant account for this event page.



2. To activate this screen, mark **Use a different Internet Merchant Account for this page**.
3. In the **Merchant account** field, select the account you want used for this page. You establish accounts in **Business Rules** accessed through *Config*.

Warning: If you click **Cancel**, any information you entered in the Web Event Wizard is lost.

4. Click **Next** and move to the Publish the Event screen, where you can complete your NetEvent page, or click **Cancel** to return to the NetSolutions - NetEvent page.

Publish the Event

On the Publish the Event screen, you can review all the information you entered in the Web Event Wizard.

► **Completing the Publish the Event screen**

1. From the Internet Merchant Account screen, click **Next**. A screen summarizing the information you included in the Web Event Wizard appears.

NetSolutions - Web Event Wizard

Publish the Event
This step allows you to review what you have entered before publishing the Event to the Web.

====Publish Event Summary====
Event Name: Spring Ball

Name: Spring Ball
Description: This is our annual fundraiser.
Details: You can purchase tickets at our office at 102 King St. downtown.

Image: Yes
Caption: Dance the night away!

Limit: 100 participants

Prices:
Individual: 1 participants
Couple: 2 participants
Corporate Sponsor: 10 participants

Collect registration fees: Yes

< Back Finish Cancel

2. Click **Finish**. A screen appears with a link to your new event Web page.

NetSolutions - Web Event Wizard

Congratulations!
This event has been successfully published to the Web.

This event has now been published to the Web. The link below will launch your browser so you can see how your event Web page looks.

[Click here to visit the event registration page](#)

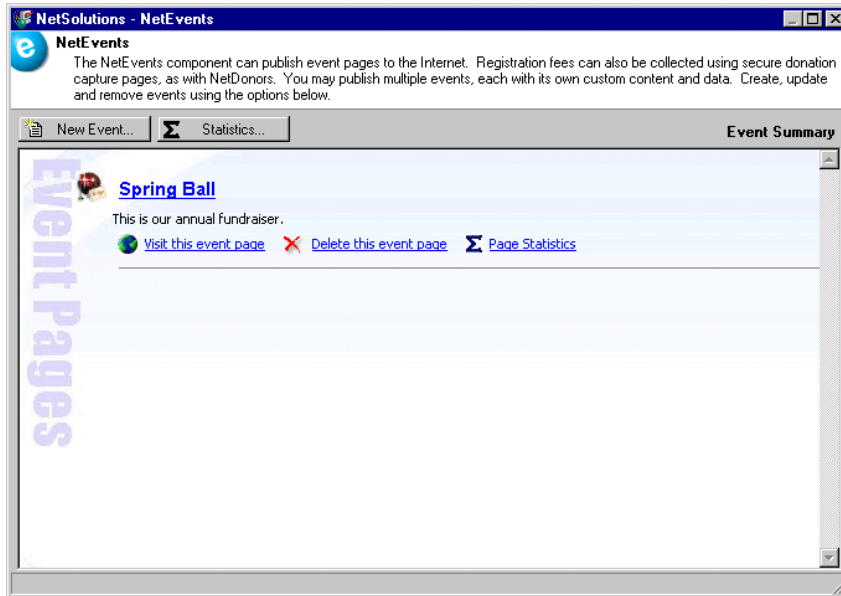
To add a link to this RE:NetSolutions page on your Web page, copy the HTML code below and paste it into the appropriate page on your site.

```
<!-- Code Supplied by Blackbaud Begins -->
<A
  HREF="http://M-PTLR61-NS781/DPXREPHIL/EventDetail.asp?cguid=6DF2B01A%2D563
  1%2D4436%2DBF1D%2D677C76A0949C&eid=53">Click here to visit the Spring Ball
  page</A>
<!-- Code Supplied by Blackbaud Ends -->
```

< Back Finish Close

3. Click the **Click here to visit the event registration page** link. The Web event page you just designed appears.
4. To add the Web event to your existing Web site, cut and paste the code provided in the field beneath the **Click here to visit the event registration page** link.

5. To exit the Web Event Wizard screen, click **Close**. You return to the NetSolutions - NetEvents screen.



The new online event appears as a link on the screen.

6. To add the event page you just designed to your Web site, open **Configure and Customise** and select the Site Map/Links tab. Click the link under **Event Registration Pages**. The code necessary to add the page to their Web site appears. Paste this code to your Web site.
7. To close the NetSolutions - NetEvents screen and return to the NetSolutions page, click the "X" in the under right corner.

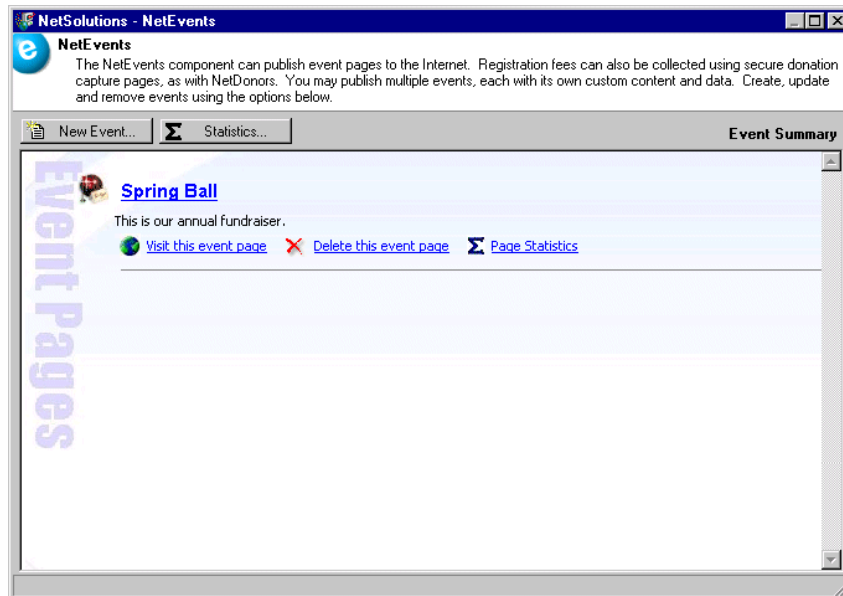
Viewing an Event Web Page

After you create an event Web page, you can access the page through *NetSolutions*. Working through *NetSolutions* you can easily make changes to the Web page.

► Viewing event Web pages

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

2. Click **NetEvents**. The NetSolutions - NetEvents screen appears.



3. Click the **Visit this event page** link. The Web page appears.



4. To exit the NetSolutions - NetEvents screen and return to the NetSolutions page, click the "X" in the upper right corner.

Deleting an Event Web Page

Once an event Web page has served its purpose, you can permanently remove it from your Web site.

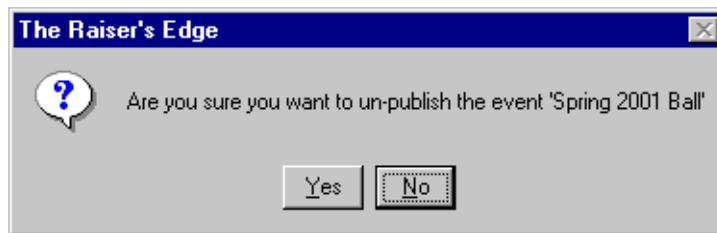
► Deleting event Web pages

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

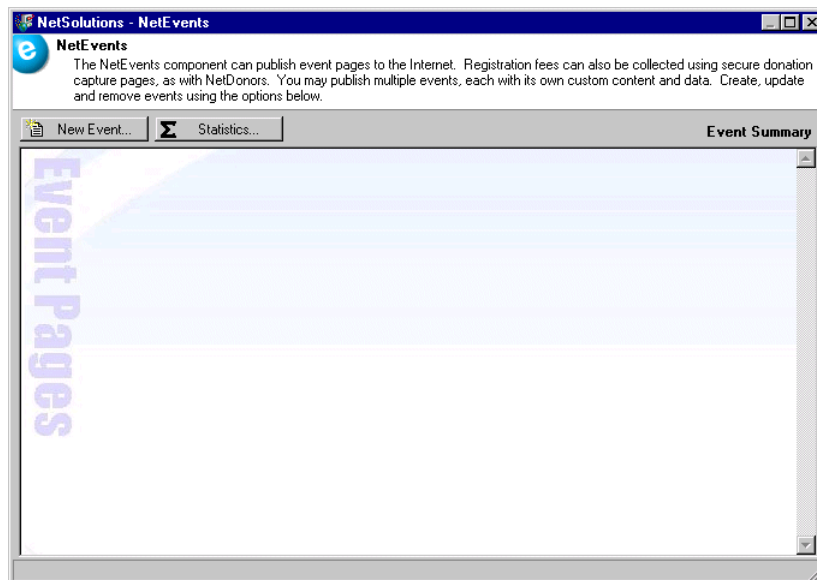
2. Click **NetEvents**. The NetSolutions - NetEvents screen appears.



3. Under the Web page link, click **Delete this event page**. A warning message appears.



4. Click **Yes**. The NetSolutions - NetEvents screen appears, minus the deleted event Web page.



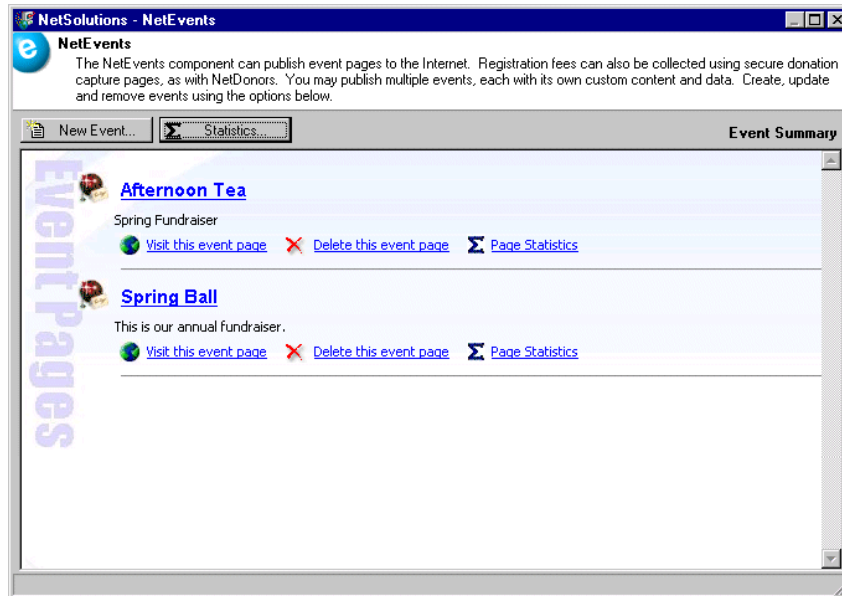
5. To exit this screen and return to the NetSolutions page, click the "X" in the upper right corner.

Viewing Event Page Statistics

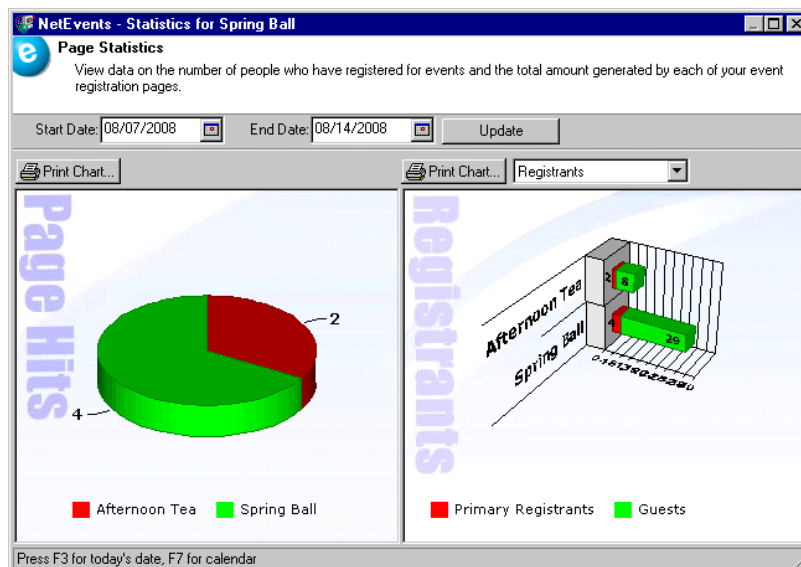
NetSolutions keeps track of how many registrants you have for each event and how much money each event page generates. You can view statistics for all event pages or for one page.

► Viewing donation page statistics

1. On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **NetEvents**. The NetSolutions - NetEvents screen appears.

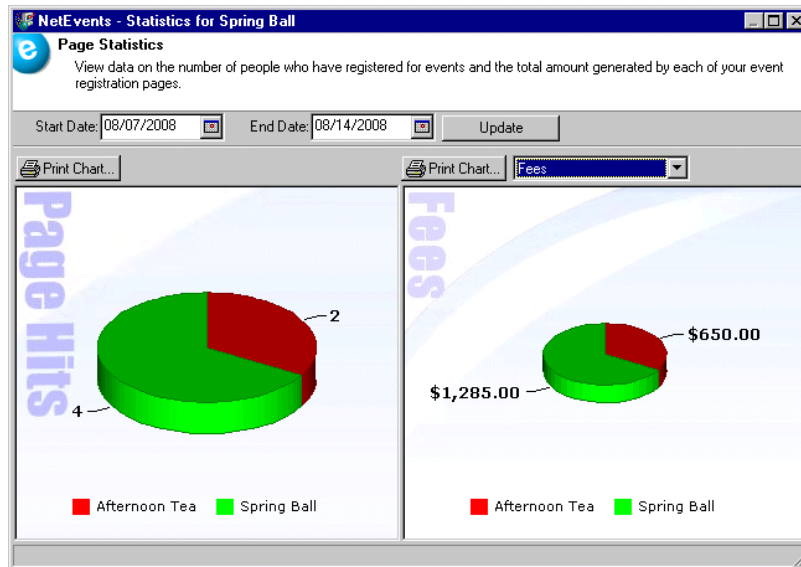


3. To view a statistical overview of registrants on all your event pages, click **Statistics**. The Event Registration Page Statistics screen appears.

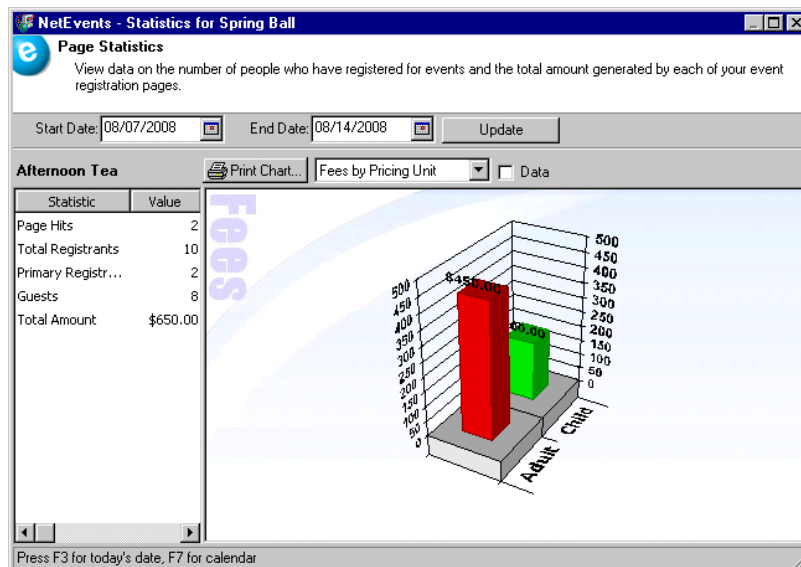


- On the left side of the screen, Page Hits, shows you how many times each donation page was visited. In the preceding example, the Afternoon Tea page was visited two times and the Spring Ball page was visited four times.

- On the right side of the screen, Registrants, shows you how many online registrants you have for each page. In the preceding example, the Afternoon Tea page has two primary registrants and eight guests the Spring Ball page has four primary registrants and 29 guests.
- To see statistics for a specific period, enter a **Start Date** and **End Date**, and click **Update**.
- To see how much money was raised in registration fees, select “Fees” in the drop-down menu above the right pane. The right graph changes, displaying fee information for each event page.



- Click **Print Chart** above each graph to print the graph.
4. To view statistics for a specific page, from the NetEvents page, click **Page Statistics** below the event page link. The Statistics screen appears.



- To see statistics for a specific period, enter a **Start Date** and **End Date**, and click **Update**.
- Click **Print Chart** above the graph to print the statistic information.
- In the drop-down menu above the chart, you can select to view Fees by Pricing Unit or Registrants by Pricing Unit.

- If you mark the **Data** checkbox, the graphic is replaced by columns, showing the **Pricing Unit** and either the **Amount** or the **Primary Registrants** and **Guests**, depending on what you select in the above bullet: Fees by Pricing Unit or Registrants by Pricing Unit.
 - On the left, the number of Page Hits, Total Registrants, Primary Registrants, Guests, and Total Amount raised from online registration fees appears.
5. To close the screen and return to the NetSolutions - NetEvents screen, click the "X" in the upper right corner.

NetDirectories

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With **NetDirectories**, you can create and publish alumni, professional, and constituent directories or donor recognition Web pages, using data from your **Raiser's Edge** database. You determine the information available in each page by selecting a constituent query from **The Raiser's Edge**.

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

Using **NetDirectories**, you select the specific constituent information to include in your directory or recognition page. For example, if you want visitors to your Web page to have access to contact information for your organization's board members, you create an online directory based on a **Raiser's Edge** query of your board members. You can include information entered on the board members records — addresses, telephone numbers, email addresses. You can publish multiple directories, update directories, and delete directories using this link.

Although Blackbaud hosts your directories and recognition pages, you have control over the design. Through the **Configure and Customize** link, you can select page and font colors, add images, include titles and descriptions, and much more. For more information on configuring your Web page, see "Configure & Customize" on page 11.

Also, in **NetDirectories**, there are additional formatting options specific to the online directory and recognition page. For example, you can add an image and caption to the page, select layout options, enter contact information, select page style options different from what you selected in **Configure and Customize**, and more.

Requirements for NetDirectories

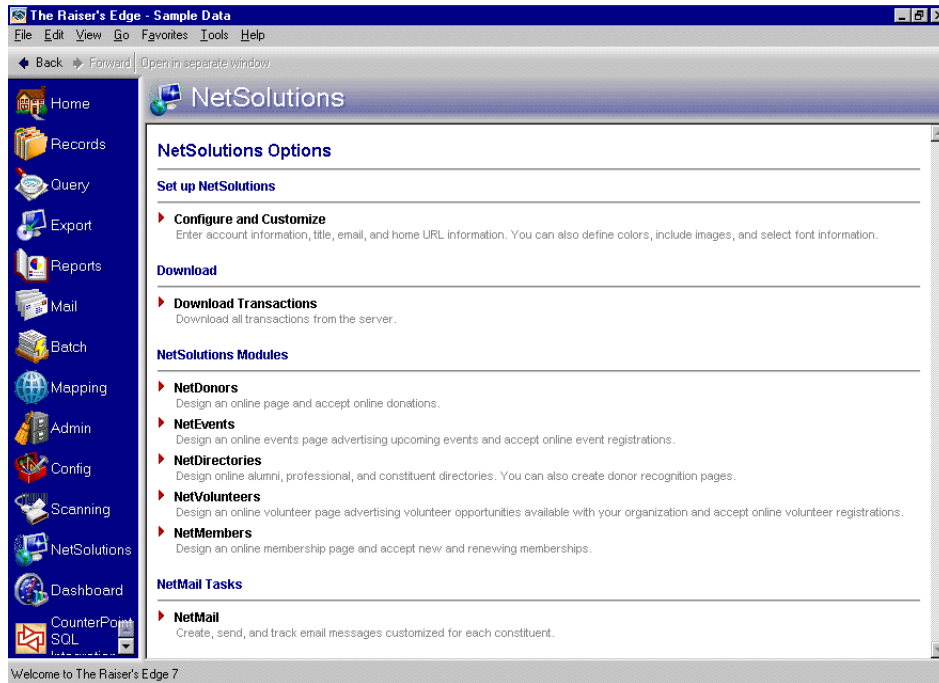
To use **NetDirectories**, you must have the following:

Warning: Before you start working in **NetDirectories**, you must register as a *NetSolutions* user and enter your **Login ID** and **Login Password** in **Configure and Customize**. For more information, see "Registering with NetSolutions" on page 1 and "Configure & Customize" on page 11.

- A Web page.
- *Internet Explorer* 5.x or higher is fully supported; however donors can use HTML 3.2 compliant browsers as well
- **The Raiser's Edge 7.x**
- *Alumni Tracking*, to publish alumni directories online.

Navigating

In *The Raiser's Edge*, you access **NetDirectories** by clicking **NetSolutions** on the Raiser's Edge bar.

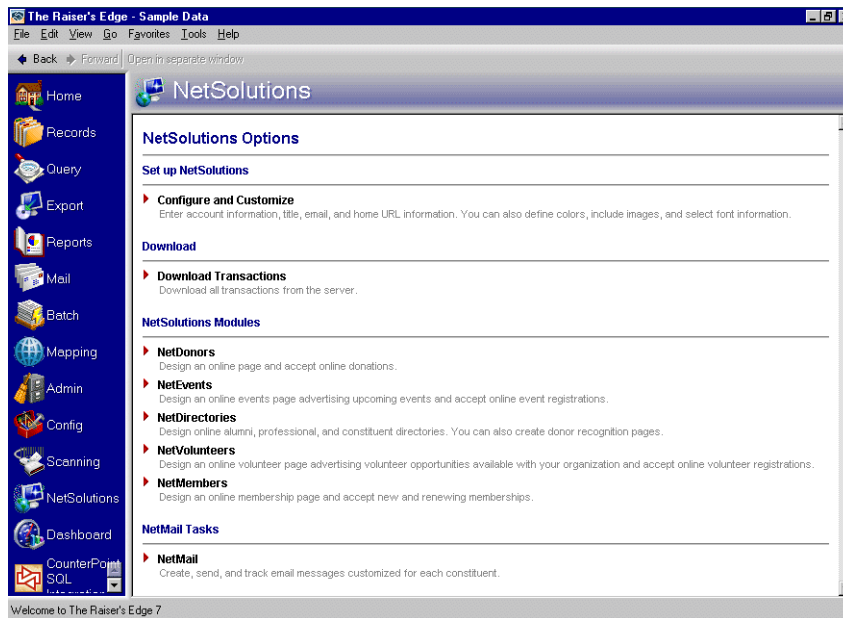


Accessing NetDirectories

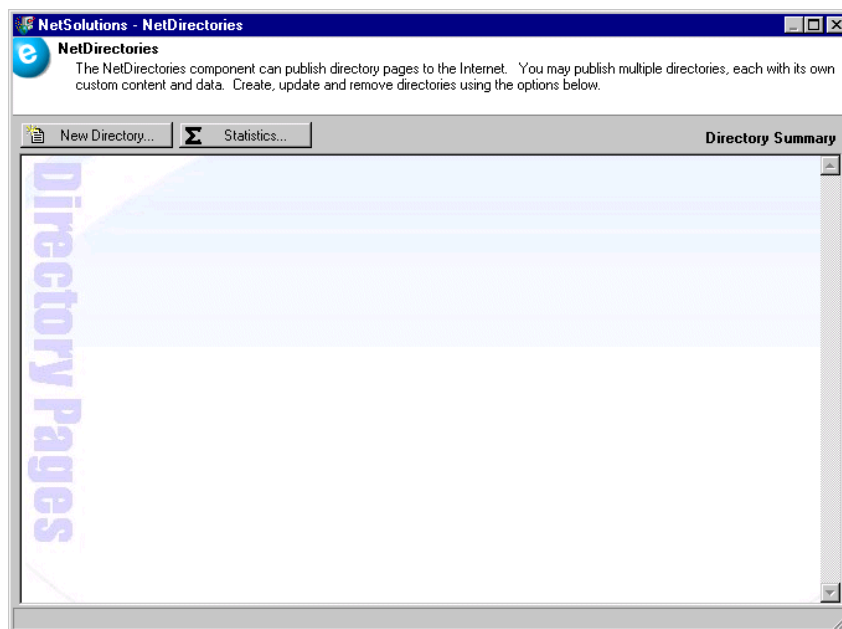
Multiple users can access different areas of *NetSolutions* simultaneously.

► Accessing NetDirectories

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



2. Click **NetDirectories**. The NetSolutions - NetDirectories screen appears.



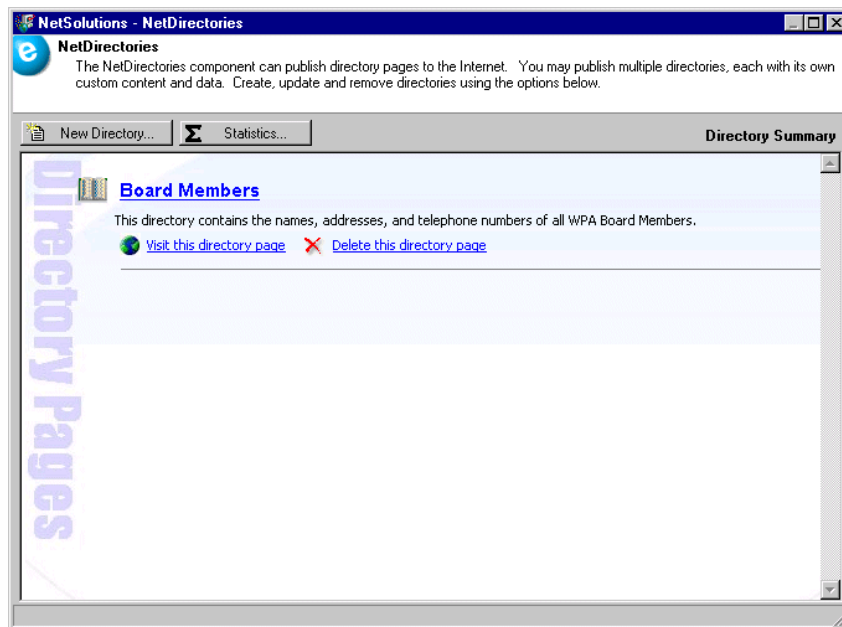
The first time you open the link, this screen appears blank. Once you create and save a **NetDirectories** file, the saved file appears on this screen.

3. To place information online, click **New Directory**. You must then select the type of information — Alumni, Professional, or Constituent directory or a Donor Recognition Page. A wizard screen appears specific to the information type you select.

The screenshot shows a Windows-style dialog box titled "NetSolutions - Constituent Directory Wizard". It features a blue header bar with a small "e" logo. Below the header, the text "Page Customization" is displayed. A descriptive paragraph states: "This wizard helps you publish a constituent directory to the Web. Enter the query on which to base your directory. Also, enter the name and description of the directory as you want them to appear on the Web." The main area contains two input fields: "Constituent query:" with the text "Board Members" and a small icon button, and "Create static query" with an unchecked checkbox. Below these, the "Directory name:" field also contains "Board Members". The "Description:" field is a larger text area containing the text: "This directory contains the names, addresses, and telephone numbers of all WPA Board Members." At the bottom right, there are three buttons: "< Back", "Next >", and "Cancel". A status bar at the very bottom says "Press F7 to zoom".

4. For information about:
 - Publishing an alumni directory on your Web site, see "Publishing an Alumni Directory on Your Web Site" on page 171
 - Publishing a professional directory on your Web site, see "Publishing a Professional Directory on Your Web Site" on page 183
 - Publishing a constituent directory on your Web site, see "Publishing a Constituent Directory on Your Web Site" on page 194
 - Publishing a donor recognition page to your Web site, see "Publishing a Donor Recognition Page on Your Web Site" on page 205

5. After you publish an online directory or recognition page, it appears as a link on the NetSolutions - NetDirectories screen.



- To open an existing directory, click the directory name link. For example, in the example above, click **Board Members** to open the board members directory.
 - To see how the directory Web page looks, click **Visit this directory page** under the directory you want to visit.
 - To delete the directory Web page, click **Delete this directory page** under the directory you want to delete.
6. To exit this screen, click the “X” in the upper right corner. You will return to the NetSolutions page.

Buttons

In **NetDirectories**, two buttons help you navigate through the program.



The **New Directory** button on the NetSolutions - NetDirectories screen opens the NetSolutions - Directories Wizard, where you can enter information for a new online directory.



The **Statistics** button on the NetSolutions - NetDirectories screen generates a chart that tracks activity on your Web pages.

Publishing an Alumni Directory on Your Web Site

Note: For more information, see “Configure & Customize” on page 11.

With **NetDirectories**, you can take alumni information from your *Raiser's Edge* database and create an online directory. You can make selected alumni address, telephone, and email information from *The Raiser's Edge* available on your Web site. The type of directory you create determines the information you can select to include. For example, "Class of" information is available to include in Alumni Directories only.

The directory Web page is hosted by Blackbaud but formatted based on your selections in **Configure and Customize** and **NetDirectories**.

Alumni Directory Page Customization

Warning: Before you start working in **NetDirectories**, you must register as a *NetSolutions* user and enter your **Login ID** and **Login Password** in **Configure and Customize**. For more information, see "Registering with NetSolutions" on page 1 and "Configure & Customize" on page 11.

This is the first procedure in a series of procedures, explaining the Alumni Directory Wizard. The following procedures should be used in succession.

- "Alumni Directory Page Customization" on page 172
- "Alumni Directory Content" on page 174
- "Alumni Directory Addressee/Salutations" on page 175
- "Alumni Directory Page" on page 178
- "Alumni Directory Page Style" on page 180
- "The Alumni Directory Finish Screen" on page 180

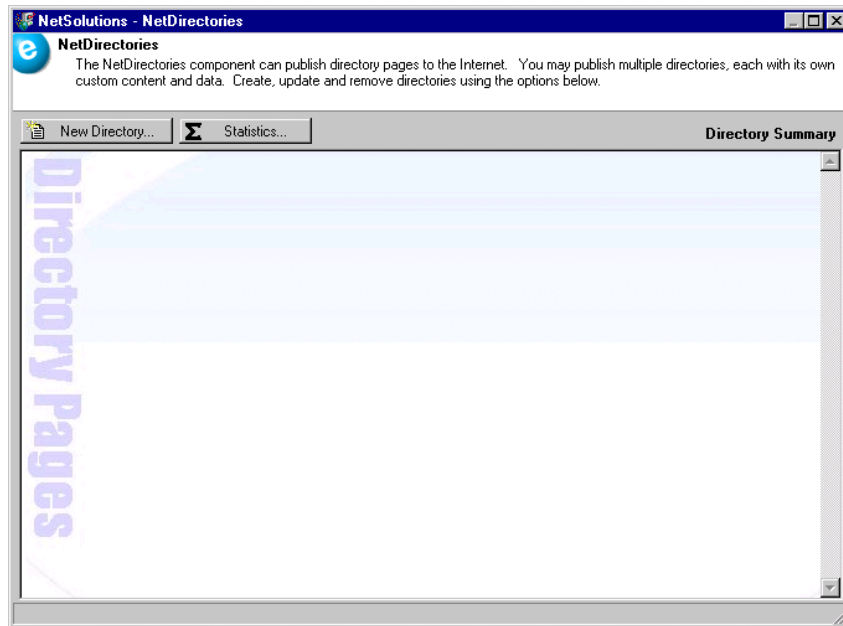
On the Page Customization screen, select the query of records to include in your online directory. You also must select the school to which the alumni directory is associated, enter a directory name, and enter a description of the directory.

► Customizing your Alumni Directory page

Note: To publish an alumni directory online, you must have *Alumni Tracking*.

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

2. Click **NetDirectories**. The NetSolutions - NetDirectories screen appears.

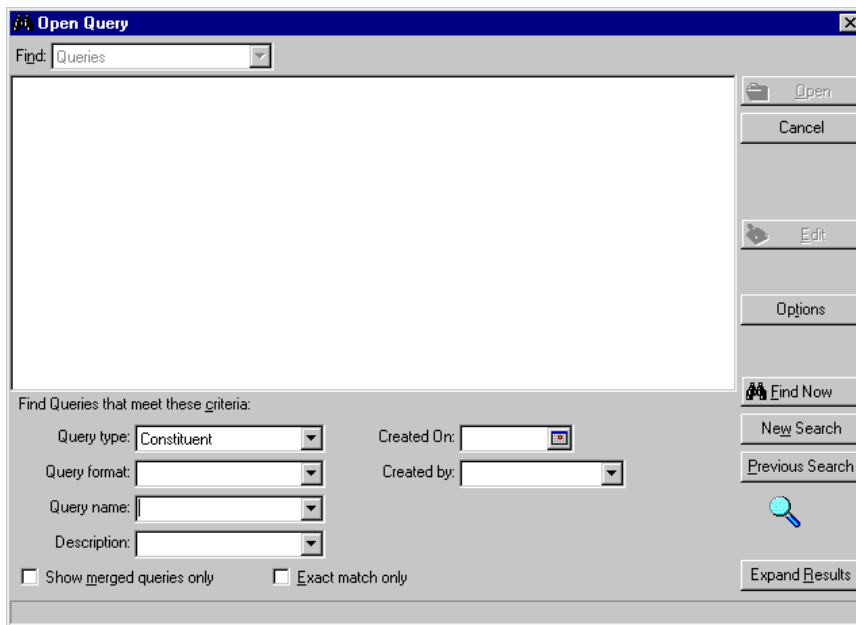


3. Click **New Directory**, and select **Alumni Directory**. The Alumni Directory Wizard screen appears.

To complete this screen, you must have a constituent query saved. It must include all records you want available in your online alumni directory.

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

4. In the **Constituent query** field, select the query to include. Click the binoculars to access the Open Query screen.



Use the Open Query screen to search for an existing query. Enter the criteria to use to filter the results. For example, you can limit a search to constituent queries, queries created by a specific person, or created on a specific date. To open a record, select the record and click **Open**. You return to the Alumni Directory Wizard screen.

5. On the Alumni Directory Wizard screen, to generate a query of the records posted on the online directory, mark the **Create static query** checkbox.
6. In the **School** field, if you select "Primary Alumni Information", only alumni with an education record with the **Primary Alumni Information** checkbox marked are included. If you select a specific school, only constituents with an education record for the selected school are included.
7. Enter a **Directory name**. This name appears as a link on the NetSolutions - NetDirectories page. Click the link to open the Alumni Directory Wizard to view or change the information included on your *NetSolutions* directory Web page.
8. Enter a **Description** of the directory to appear under the **Directory name** on the NetSolutions - NetDirectories page. There is a 1,024 character limit.
9. Click **Next** and move to the Alumni Directory Content screen, or click **Cancel** to return to the NetSolutions page.

Alumni Directory Content

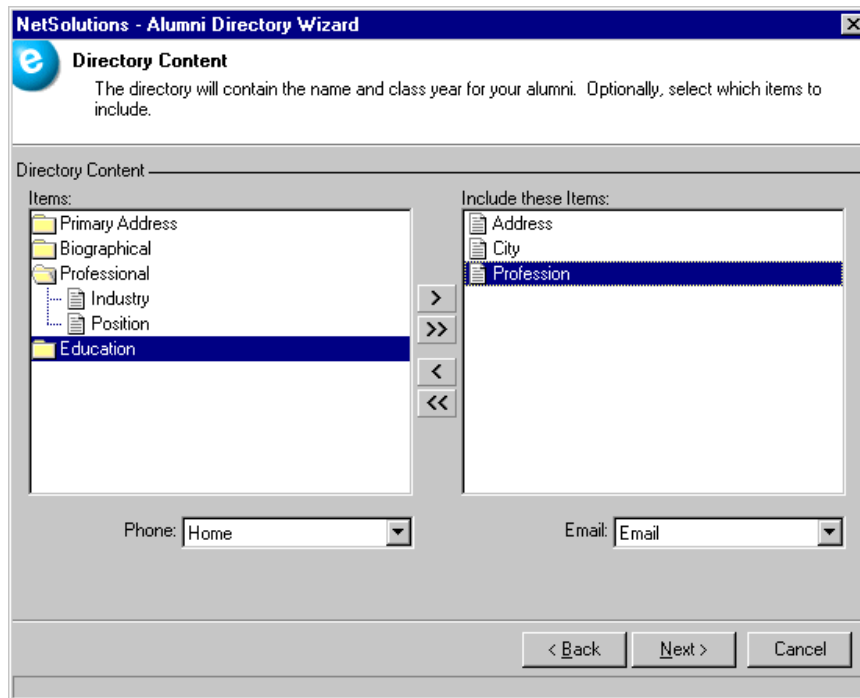
This is the second procedure in a series of procedures, explaining the Alumni Directory Wizard. The following procedures should be used in succession.

- "Alumni Directory Page Customization" on page 172
- "Alumni Directory Content" on page 174
- "Alumni Directory Addressee/Salutations" on page 175
- "Alumni Directory Page" on page 178
- "Alumni Directory Page Style" on page 180
- "The Alumni Directory Finish Screen" on page 180

On the Directory Content screen, select the information to include in your online directory. If the constituent record includes the items you select on this screen, the information is included with the directory.

► **Customizing the Alumni Directory Content screen**

1. Once you complete the Page Customization screen, click **Next**. The Directory Content screen appears.



2. The **Items** box contains all information available to include in your online directory. The **Include these Items** box contains all items selected to be included in the online directory. All Primary Address information defaults in the **Include these Items** box.

If you do not want to include an address item, from the **Include these Items** box, select the item you want to remove and click the left arrow button.

To add an item, from the **Items** box, select the item to include and click the right arrow button.

3. In the **Phone** field, select the Phone type to include in the directory. The options available depend on the phone types created in the **Phone Types** table in *Configuration*. For more information, see the Configuration chapter of the *Configuration and Security Guide*.
4. In the **Email** field, select the email type to include in the directory. The options available depend on the phone types created in the **Phone Types** table in *Configuration*. For more information, see the Configuration chapter of the *Configuration and Security Guide*.
5. Click **Next** and move to the Alumni Directory Addressee/Salutations screen, or click **Cancel** to return to the NetSolutions page.

Alumni Directory Addressee/Salutations

This is the third procedure in a series of procedures, explaining the Alumni Directory Wizard. The following procedures should be used in succession.

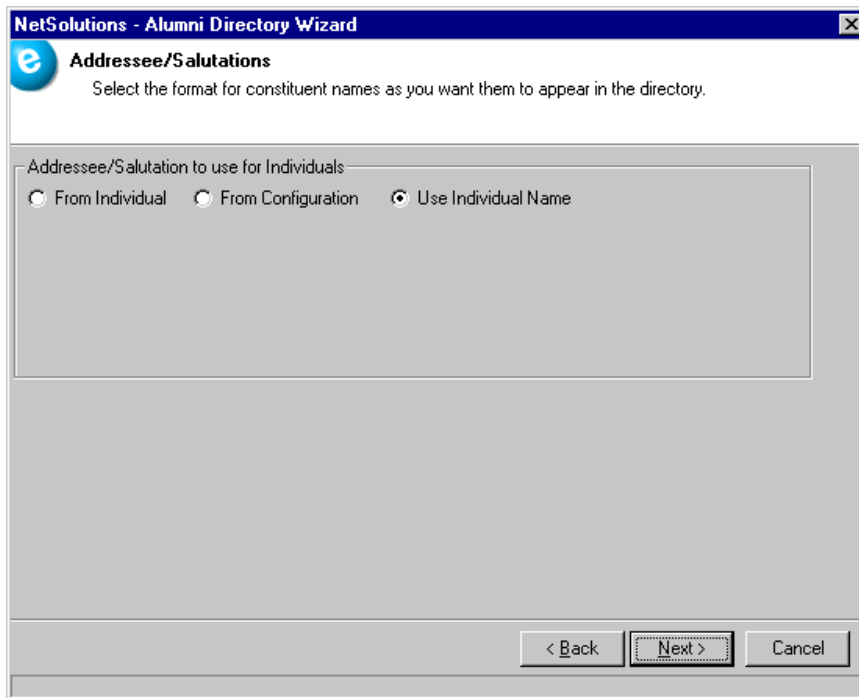
- “Alumni Directory Page Customization” on page 172
- “Alumni Directory Content” on page 174
- “Alumni Directory Addressee/Salutations” on page 175

- “Alumni Directory Page” on page 178
- “Alumni Directory Page Style” on page 180
- “The Alumni Directory Finish Screen” on page 180

On the Addressee/Salutations screen, select the addressee/salutation format to use with names in your online directory.

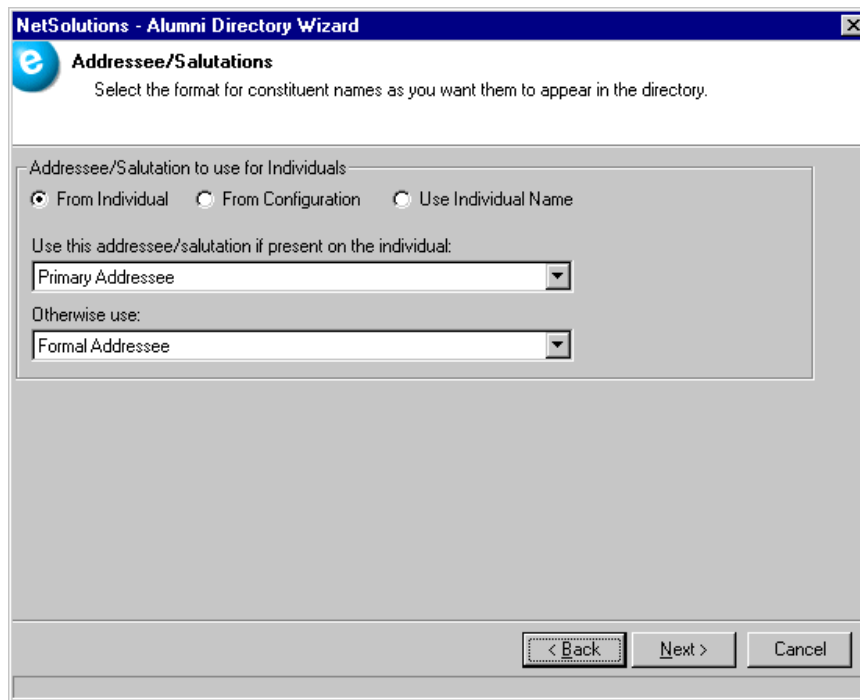
► **Customizing the Alumni Directory Addressee/Salutations screen**

1. Once you complete Directory Content screen, click **Next**. A screen appears asking you to select an Addressee/Salutation format for your online directory.



2. If you select **Use Individual Name**, no addressee/salutation is used in the directory; only the individual's name appears.

If you select **From Individual**, the addressee/salutation used in your online directory is based on information entered in the individual's constituent record.

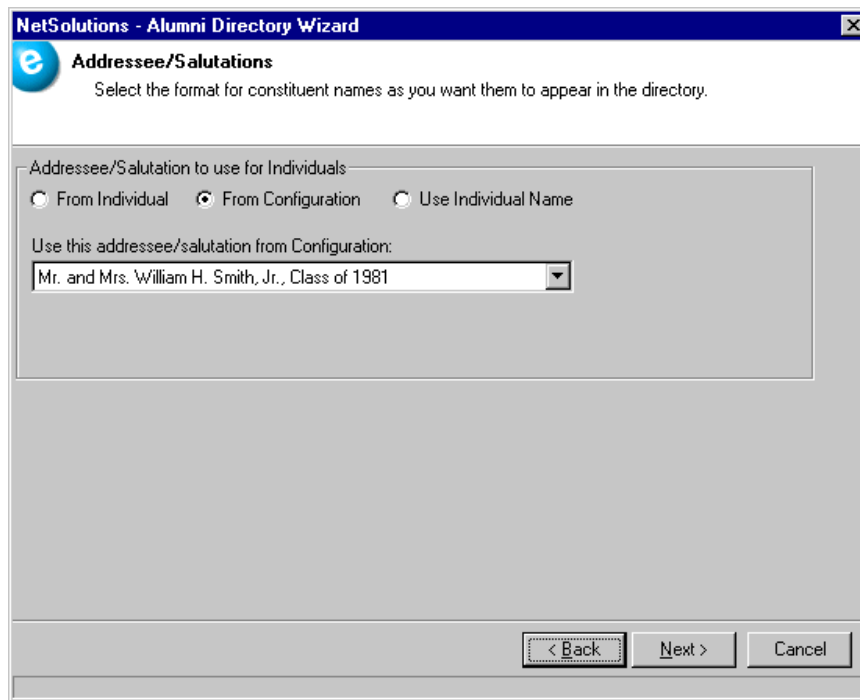


The screenshot shows a window titled "NetSolutions - Alumni Directory Wizard" with a sub-header "Addressee/Salutations". Below the sub-header is the instruction: "Select the format for constituent names as you want them to appear in the directory." The main area contains a section titled "Addressee/Salutation to use for Individuals" with three radio buttons: "From Individual" (selected), "From Configuration", and "Use Individual Name". Below these are two dropdown menus. The first is labeled "Use this addressee/salutation if present on the individual:" and has "Primary Addressee" selected. The second is labeled "Otherwise use:" and has "Formal Addressee" selected. At the bottom right are three buttons: "< Back", "Next >", and "Cancel".

In the **Use this addressee/salutation if present on the individual** field select the addressee/salutation you want the program to look for first. If the program does not find your first choice on the individual's record, it uses the addressee/salutation selected in the **Otherwise use** field. If neither is present, the individual name is used.

Note: For more information about addressee/salutation information, see the Configuration chapter in the *Configuration & Security Guide*.

If you select **From Configuration**, the addressee/salutation used in your online directory is based on information entered in *Configuration*.



In the **Use this addressee/salutation from Configuration** field, select the addressee/salutation to use in this directory. All selections entered through **Business Rules** in *Configuration* are available.

3. Click **Next** and move to the Alumni Directory Page screen, or click **Cancel** to return to the NetSolutions page.

Alumni Directory Page

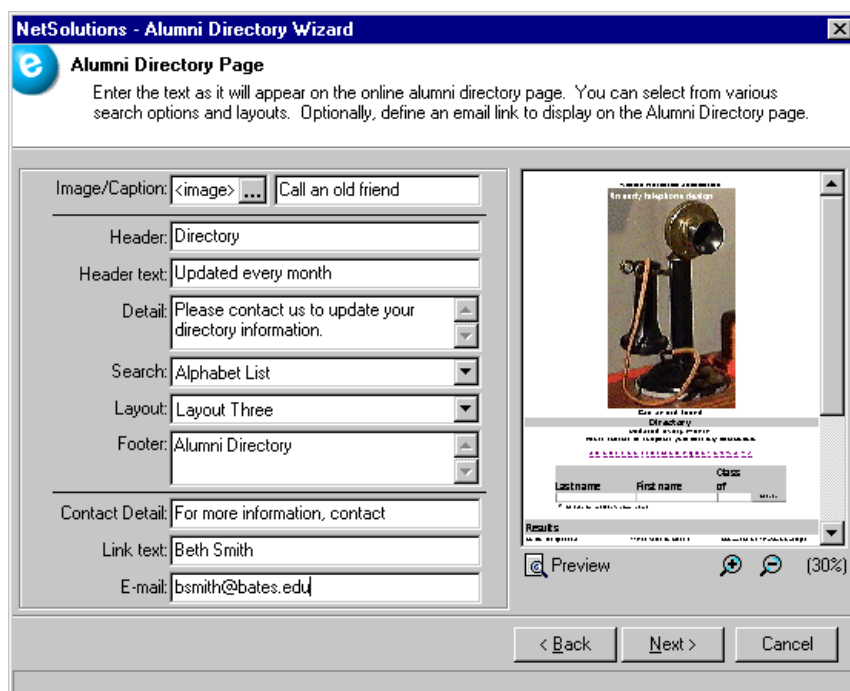
This is the fourth procedure in a series of procedures, explaining the Alumni Directory Wizard. The following procedures should be used in succession.

- “Alumni Directory Page Customization” on page 172
- “Alumni Directory Content” on page 174
- “Alumni Directory Addressee/Salutations” on page 175
- “Alumni Directory Page” on page 178
- “Alumni Directory Page Style” on page 180
- “The Alumni Directory Finish Screen” on page 180

On the Alumni Directory Pages screen, you can enter detailed formatting information for your online directory page. You can enter a header, detail information, search options, layout information, footers, and more.

► Customizing the Alumni Directory Page

1. Once you complete the Addressee/Salutation screen, click **Next**. The Alumni Directory Page appears.



2. In the first **Image/Caption** field, you can include an image on your online directory page. Click the ellipsis to access the Open screen.
Select the image file to include on the online directory page, and click **Open** to return to the NetSolutions - NetDirectory Wizard screen.
3. In the second **Image/Caption** field, enter a caption to appear under the image.

Note: For more information about adding your logo to the directory Web page, see “Configuring Your Web Pages” on page 23.

4. Enter a **Header**. For example, you can enter “Directory”. This appears at the top of your online directory page, under the **Title** information you entered in **Configure and Customize**.
5. Enter any **Header text**. This is an explanation to appear under the **Header**.
6. In the **Detail** box, enter any additional directory information.
7. In the **Search** field, select how visitors will search your online directory.
 - “Alphabet List”: The alphabet appears on your directory page under the header information. Clicking a letter generates a list of all individuals in the directory whose last name begins with the selected letter.
 - “Class of List - Year”: Year options appear under the header information. The directory displays all years, starting with the earliest “Class Of” and going to the latest.
 - “Class of List - Decade”: Decade options appear under the header information. The directory displays all decades, starting with the earliest and going to the latest, and all decades in between.
8. In the **Layout** field, select the number of columns you want used to display results.
 - “Layout One”: Displays results in one column.
 - “Layout Two”: May display results in two columns, depending on the fields you selected to include in your directory.
 - “Layout Three”: May display results in three columns, depending on the fields you selected to include in your directory.

- “Layout Four”: May display results in four columns, depending on the fields you selected to include in your directory.
9. You can also enter a **Footer** to appear at the bottom of all directory pages.
 10. In the **Contact Detail** field, enter the text you want to precede an email link. For example, enter “For more information, contact”.
 11. In the **Link text** field, enter the text to use for the email link.
 12. In the **Email** field, enter the email address of the person to use as your organization contact. A link appears on the directory page.
 13. Click **Preview** to see how the information you added on this screen appears online.
 14. Click **Next** and move to the Alumni Directory Page Style screen, or click **Cancel** to return to the NetSolutions page.

Alumni Directory Page Style

This is the fifth procedure in a series of procedures, explaining the Alumni Directory Wizard. The following procedures should be used in succession.

- “Alumni Directory Page Customization” on page 172
- “Alumni Directory Content” on page 174
- “Alumni Directory Addressee/Salutations” on page 175
- “Alumni Directory Page” on page 178
- “Alumni Directory Page Style” on page 180
- “The Alumni Directory Finish Screen” on page 180

Using the Page Style screen, you can give your directory page a unique look, setting it apart from your other *NetSolutions* pages. The style you established in **Configure and Customize** defaults to all your *NetSolutions* Web pages, but you can change the style for each page using the Page Style screen. The fields and checkboxes available on this screen change based on the **Page section** you select. You can change the background, logo and title, image, header, detail, body, table legend, table headers, table text, and error text styles.

For detailed instructions about each option, see “Changing Page Style” on page 387.

If you are happy with the page style you established in **Configure and Customize**, do not make any changes on this screen, and click **Next** to move to The Alumni Directory Finish Screen.

The Alumni Directory Finish Screen

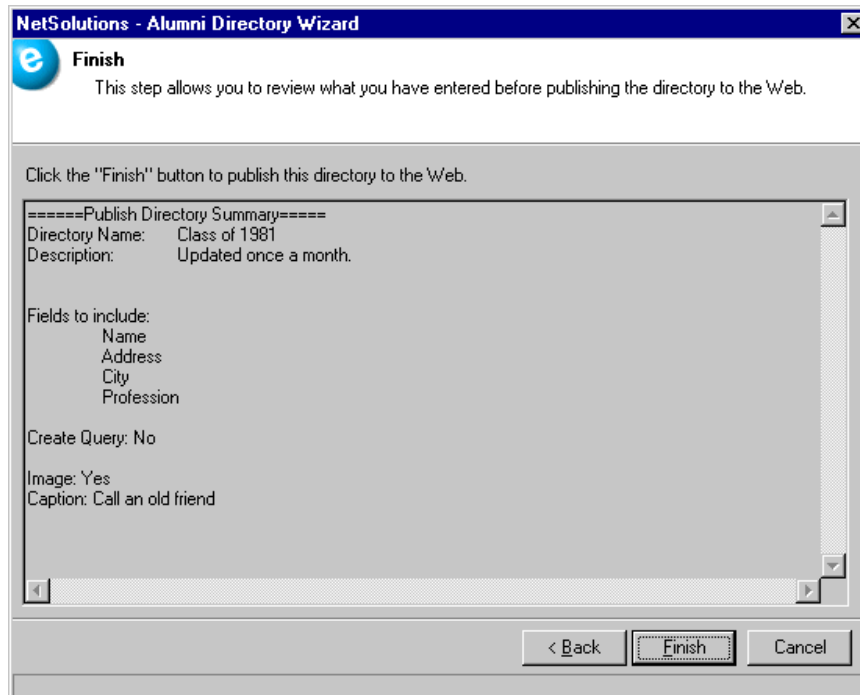
This is the sixth procedure in a series of procedures, explaining the Alumni Directory Wizard. The following procedures should be used in succession.

- “Alumni Directory Page Customization” on page 172
- “Alumni Directory Content” on page 174
- “Alumni Directory Addressee/Salutations” on page 175
- “Alumni Directory Page” on page 178
- “Alumni Directory Page Style” on page 180
- “The Alumni Directory Finish Screen” on page 180

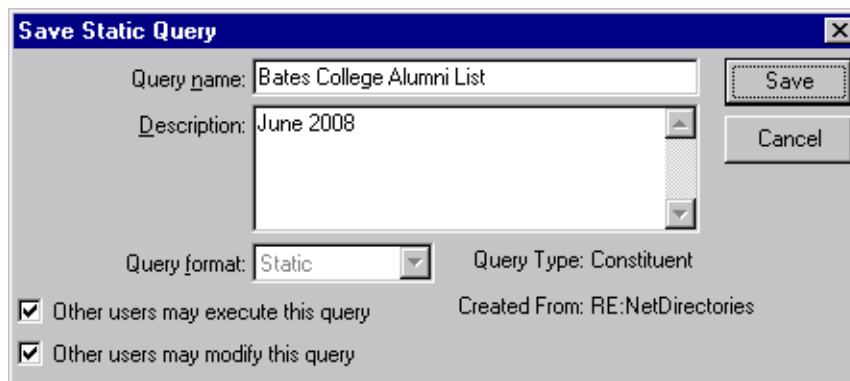
On the Finish screen, you can review all the information you entered in the Alumni Directory Wizard.

► **Finishing the Alumni Directory Wizard**

1. After you enter all the necessary information on the various Alumni Directory Wizard screens, the Finish screen appears, summarizing all parameter settings you selected for your online directory.

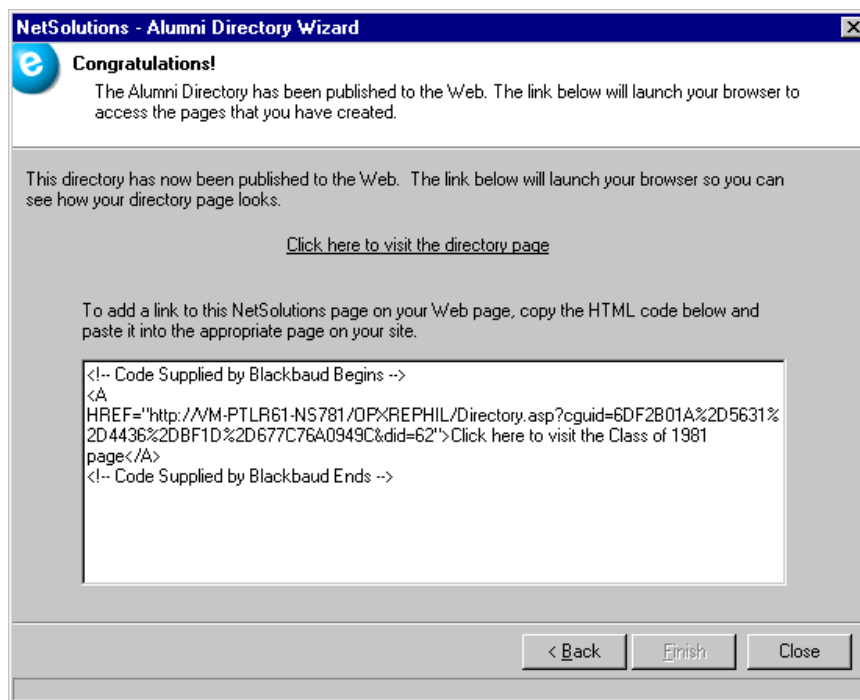


2. Click **Finish**. If you marked the **Create static query** checkbox on the Page Customization screen, the Save Static Query screen appears.

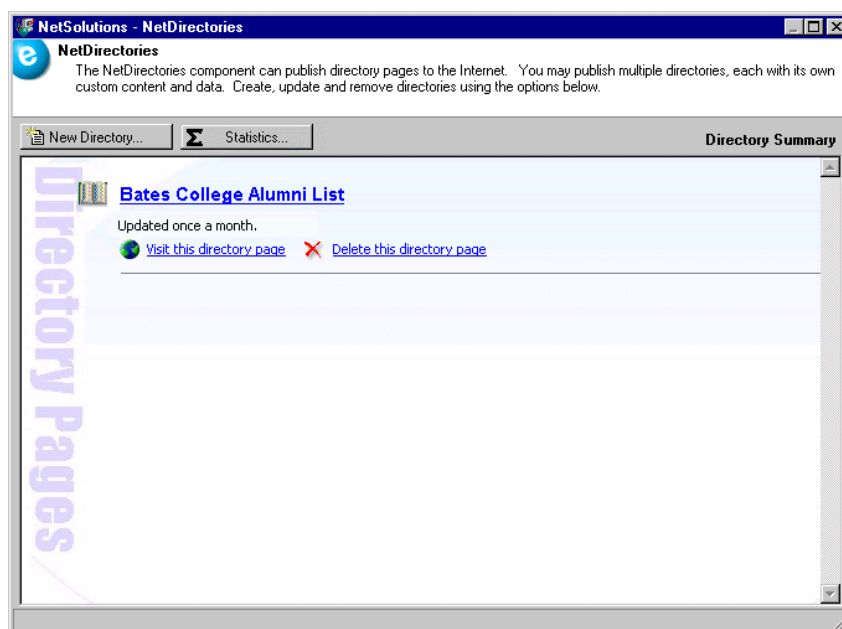


3. Enter a **Query name**; enter a **Description** to help remember the details regarding this query. You can also mark the **Other users may execute this query** and **Other users may modify this query** checkboxes, allowing others to work in and change this query.

- Click **Save**. The directory page is processed. A screen appears with a link to your new online directory page.



- Click the **Click here to visit the directory page** link. The online directory page you just designed appears.
- To add this directory to your existing Web site, cut and paste the code provided in the box beneath the **Click here to visit the directory page** link.
- To exit the Alumni Directory Wizard screen, click **Close**. You return to the NetSolutions - NetDirectories screen. The new online directory appears as a link on the screen.



- To close the NetSolutions - NetDirectories screen and return to the NetSolutions page, click the "X" in the upper right corner of the screen.

Publishing a Professional Directory on Your Web Site

With **NetDirectories**, you can take professional information from your database and create an online directory. You can make selected professional information from *The Raiser's Edge* available on your Web site. The type of directory selected determines the information you can select to include.

The directory Web page is hosted by Blackbaud but formatted based on your selections in **Configure and Customize** and **NetDirectories**. For more information, see "Configure & Customize" on page 11.

Professional Page Customization

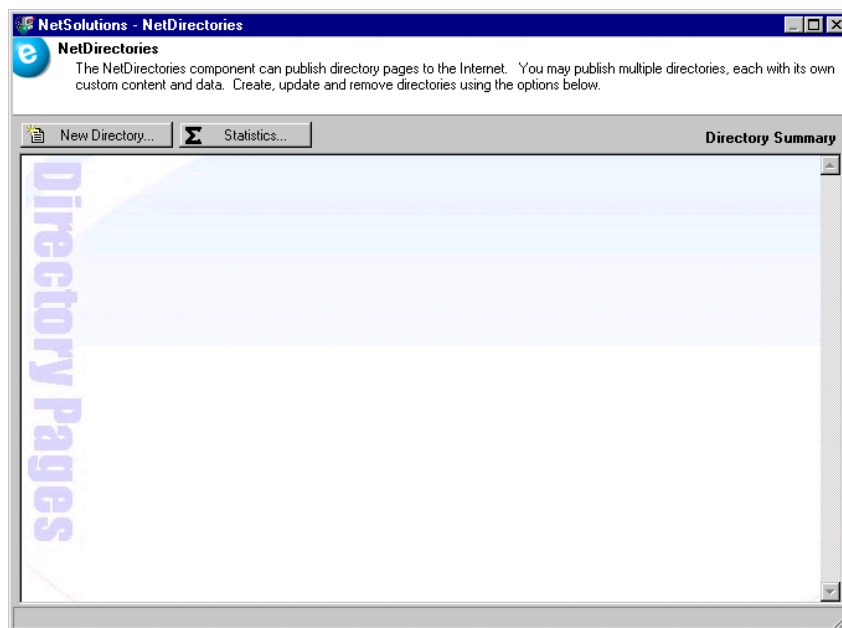
This is the first procedure in a series of procedures, explaining the Professional Directory Wizard. The following procedures should be used in succession.

- "Professional Page Customization" on page 183
- "Professional Directory Content" on page 185
- "Professional Addressee/Salutations" on page 186
- "Professional Directory Page" on page 189
- "Professional Directory Page Style" on page 191
- "Professional Directory Finish Screen" on page 192

On the Page Customization screen, select the query of records to include in your online directory. You also must enter a directory name and description.

► Filling out the Professional Directory Page Customization screen

1. On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **NetDirectories**. The NetSolutions - NetDirectories screen appears.



- Click **New Directory** and select **Professional Directory**. The Professional Directory Wizard screen appears.

NetSolutions - Professional Directory Wizard

Page Customization

This wizard helps you publish a professional directory to the Web. Enter the query on which to base your directory. Also, enter the name and description of the directory as you want them to appear on the Web.

Constituent query: ☐ Create static query

Directory name:

Description:

< Back Next > Cancel

To complete this screen, you must have a query saved. It must include all records you want available in your online directory.

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

- In the **Constituent query** field, select the query to include. Click the binoculars to access the Open Query screen.

Open Query

Find:

Open Cancel

Edit Options

Find Now New Search Previous Search

Find Queries that meet these criteria:

Query type: Created On:

Query format: Created by:

Query name:

Description:

☐ Show merged queries only ☐ Exact match only

Expand Results

You can use the Open Query screen to search for an existing query. You can enter the criteria to use to filter the results. For example, you can limit a search to constituent queries, queries created by a specific person, or created on a specific date. To open a record, select the record and click **Open**. You return to the Professional Directory Wizard screen.

5. To generate a query of records posted on the online directory, mark the **Create static query** checkbox.
6. Enter a **Directory name**. This name appears as a link on the NetSolutions - NetDirectories page. Click the link to open the Professional Directory Wizard and view or change the information included on your *NetSolutions* directory Web page.
7. Enter a **Description** of the directory to appear under the **Directory name** on the NetSolutions - NetDirectories page. There is a 1,024 character limit.
8. Click **Next** and move to the Professional Directory Content screen, or click **Cancel** to return to the NetSolutions page.

Professional Directory Content

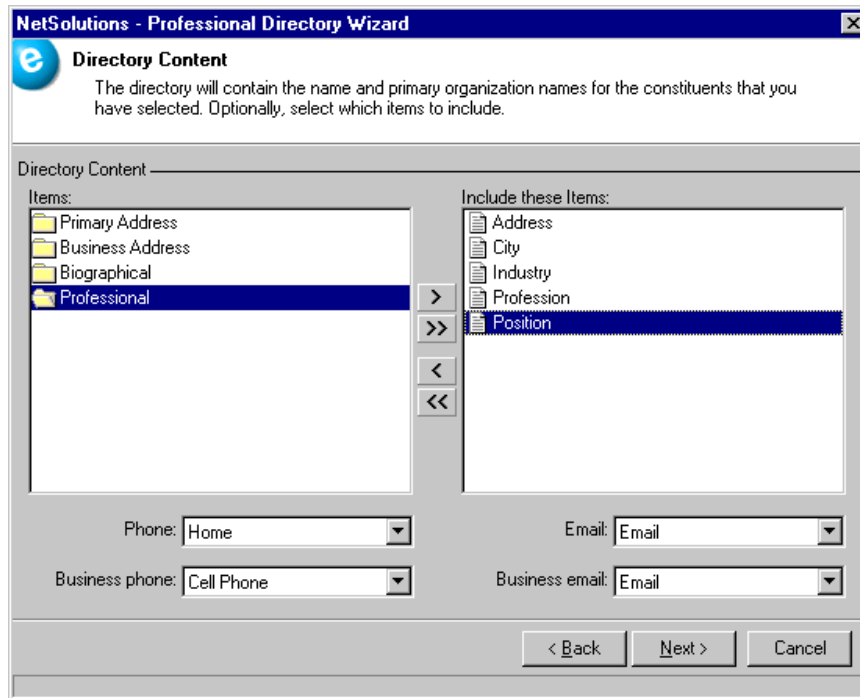
This is the second procedure in a series of procedures, explaining the Professional Directory Wizard. The following procedures should be used in succession.

- "Professional Page Customization" on page 183
- "Professional Directory Content" on page 185
- "Professional Addressee/Salutations" on page 186
- "Professional Directory Page" on page 189
- "Professional Directory Page Style" on page 191
- "Professional Directory Finish Screen" on page 192

On the Directory Content screen, select all the information to include in your online directory. If the constituent record includes the items you select on this screen, the information is included with the directory.

► **Customizing the Professional Directory Content screen**

1. Once you complete the Page Customization screen, click **Next**. The Directory Content screen appears.



2. The **Items** box contains all information available to include in your online directory. The **Include these Items** box contains all items selected to be included in the online directory.
If you do not want to include an item, from the **Include these Items** box, select the item to remove and click the left arrow button.
To add an item, from the **Items** box, select the item to include and click the right arrow button.
3. In the **Phone** field, select the Phone type to include in the directory. The options available depend on the phone types created in the **Phone Types** table in *Configuration*. For more information, see the Configuration chapter of the *Configuration and Security Guide*.
4. In the **Email** field, select the email type to include in the directory. The options available depend on the phone types created in the **Phone Types** table in *Configuration*. For more information, see the Configuration chapter of the *Configuration and Security Guide*.
5. In the **Business phone** field, select the business phone type to include in the directory. The options available depend on the phone types created in the **Phone Types** table in *Configuration*. For more information, see the Configuration chapter of the *Configuration and Security Guide*.
6. In the **Business email** field, select the business email type to include in the directory. The options available depend on the phone types created in the **Phone Types** table in *Configuration*. For more information, see the Configuration chapter of the *Configuration and Security Guide*.
7. Click **Next** and move to the Professional Addressee/Salutations screen, or click **Cancel** to return to the NetSolutions page.

Professional Addressee/Salutations

This is the third procedure in a series of procedures, explaining the Professional Directory Wizard. The following procedures should be used in succession.

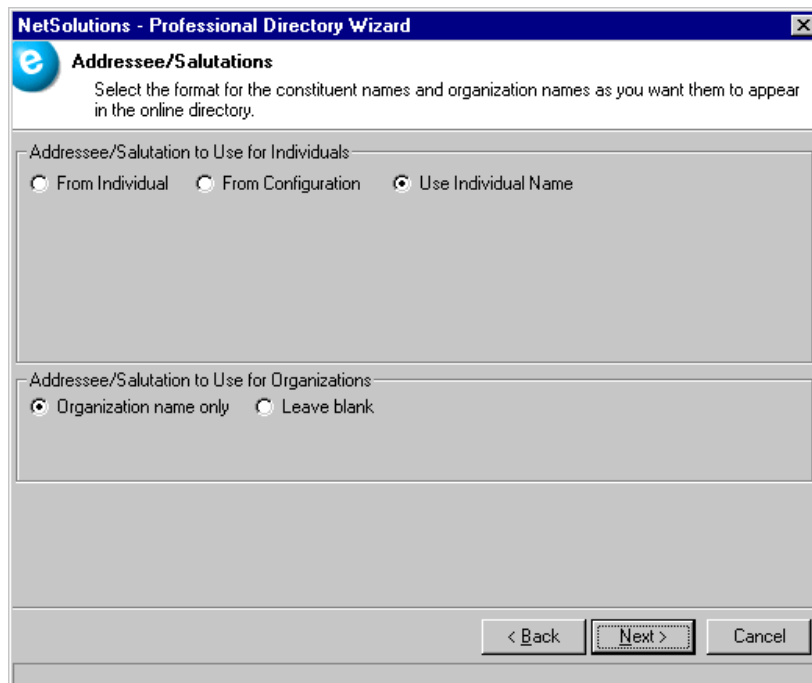
- “Professional Page Customization” on page 183

- “Professional Directory Content” on page 185
- “Professional Addressee/Salutations” on page 186
- “Professional Directory Page” on page 189
- “Professional Directory Page Style” on page 191
- “Professional Directory Finish Screen” on page 192

On the Addressee/Salutations screen, select the addressee/salutation format to use with names in your online directory.

► **Customizing the Professional Directory Addressee/Salutation screen**

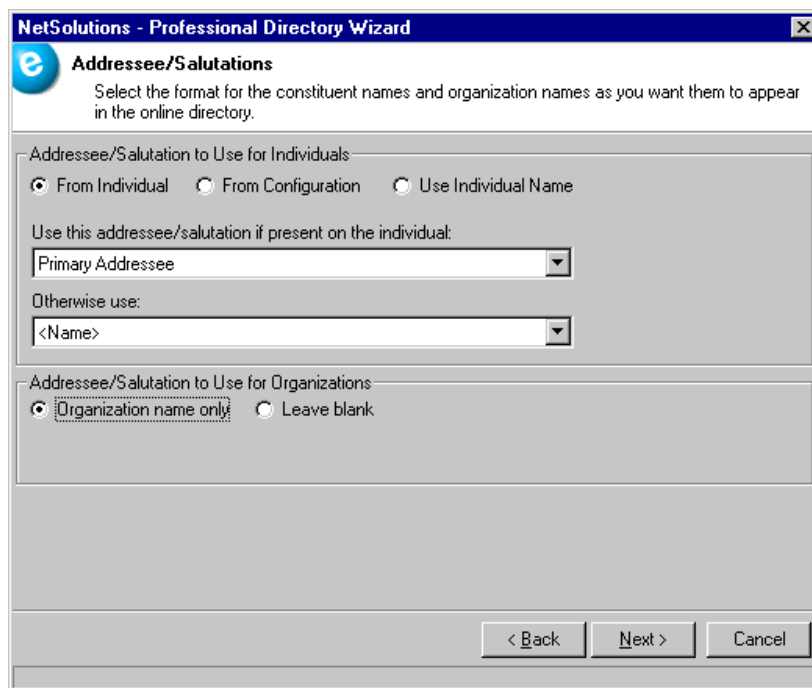
1. Once you complete the Directory Content screen, click **Next**. The Addressee/Salutations screen appears.



The screenshot shows a window titled "NetSolutions - Professional Directory Wizard" with a close button in the top right corner. The window has a blue header bar with a white "e" logo and the title "Addressee/Salutations". Below the header, there is a text box that says "Select the format for the constituent names and organization names as you want them to appear in the online directory." The main area of the window is divided into two sections. The first section is titled "Addressee/Salutation to Use for Individuals" and contains three radio buttons: "From Individual", "From Configuration", and "Use Individual Name". The "Use Individual Name" radio button is selected. The second section is titled "Addressee/Salutation to Use for Organizations" and contains two radio buttons: "Organization name only" and "Leave blank". The "Organization name only" radio button is selected. At the bottom of the window, there are three buttons: "< Back", "Next >", and "Cancel".

2. In the **Addressee/Salutation to Use for Individuals** frame, if you select **From Individual Name**, no addressee/salutation is used in the directory; only the individual name appears.

If you select **From Individual**, the addressee/salutation used in your online directory is based on information entered in the individual's constituent record.



The screenshot shows a window titled "NetSolutions - Professional Directory Wizard" with a close button in the top right corner. The window has a blue header bar with a white 'e' logo and the title "Addressee/Salutations". Below the header, there is a text box that says "Select the format for the constituent names and organization names as you want them to appear in the online directory." The main area of the window is divided into two sections. The first section is titled "Addressee/Salutation to Use for Individuals" and contains three radio buttons: "From Individual" (which is selected), "From Configuration", and "Use Individual Name". Below these radio buttons are two dropdown menus. The first dropdown menu is labeled "Use this addressee/salutation if present on the individual:" and has "Primary Addressee" selected. The second dropdown menu is labeled "Otherwise use:" and has "<Name>" selected. The second section is titled "Addressee/Salutation to Use for Organizations" and contains two radio buttons: "Organization name only" (which is selected) and "Leave blank". At the bottom of the window, there are three buttons: "< Back", "Next >", and "Cancel".

In the **Use this addressee/salutation if present on the individual** field enter the addressee/salutation you want the program to look for first. If the program does not find your first choice on the individual record, it uses the addressee/salutation selected in the **Otherwise use** field. If neither is present, the individual name is used.

Note: For more information about addressee/salutation information entered in *Configuration*, see the Configuration chapter in the *Configuration & Security Guide*.

If you select **From Configuration**, the addressee/salutation used in your online directory is based on information entered in *Configuration*.

The screenshot shows a Windows-style dialog box titled "NetSolutions - Professional Directory Wizard". The main heading is "Addressee/Salutations" with a sub-instruction: "Select the format for the constituent names and organization names as you want them to appear in the online directory." The dialog is divided into two sections. The first section, "Addressee/Salutation to Use for Individuals", contains three radio buttons: "From Individual", "From Configuration" (which is selected), and "Use Individual Name". Below these is a text box labeled "Use this addressee/salutation from Configuration:" containing the text "Mr. William H. Smith and Mrs. Margaret A. Adams" and a dropdown arrow. The second section, "Addressee/Salutation to Use for Organizations", contains two radio buttons: "Organization name only" (which is selected) and "Leave blank". At the bottom of the dialog are three buttons: "< Back", "Next >", and "Cancel".

In the **Use this addressee/salutation from Configuration** field, select the addressee/salutation you want the program to use. All selections entered through **Business Rules** in *Configuration* are available.

3. In the **Addressee/Salutation to Use for Organizations** frame, you can select the **Organization name only** or **Leave blank**.
4. Click **Next** and move to the Professional Directory Page screen, or click **Cancel** to return to the NetSolutions page.

Professional Directory Page

This is the fourth procedure in a series of procedures, explaining the Professional Directory Wizard. The following procedures should be used in succession.

- "Professional Page Customization" on page 183
- "Professional Directory Content" on page 185
- "Professional Addressee/Salutations" on page 186
- "Professional Directory Page" on page 189
- "Professional Directory Page Style" on page 191
- "Professional Directory Finish Screen" on page 192

On the Directory Pages screen, you can enter detailed formatting information for your online directory page. You can enter a header, detail information, search options, layout information, footers, and more.

► Customizing the Professional Directory Page screen

1. Click **Next**. A screen appears asking you to enter directory page information.

2. In the first **Image/Caption** field, you can include an image on your online directory page. Click the ellipsis to access the Open screen.

Select the image file to include on the online directory page, and click **Open** to return to the Professional Directory Wizard screen.

3. In the second **Image/Caption** field, enter a caption to appear under the image.

Note: For more information on adding your logo to the directory Web page, see “Configuring Your Web Pages” on page 23.

4. Enter a **Header**. This appears at the top of your online directory page, under the **Title** information you entered in **Configure and Customize**.
5. Enter any **Header text**. This is an explanation to appear under the **Header**.
6. In the **Detail** box, enter any additional directory information. For example, you can enter how often you update the online directory.
7. In the **Search** field, select how visitors will search your online directory.
 - “Alphabet List”: The alphabet appears on your directory page under the header information. Clicking a letter generates a list of all individuals in the directory whose last name begins with the selected letter.
 - “Profession”: All professions included in the query appear under the header information.
8. In the **Layout** field, select the number of columns used to display results.
 - “Layout One”: Displays results in one column.
 - “Layout Two”: May display results in two columns, depending on the fields you selected to include in your directory.
 - “Layout Three”: May display results in three columns, depending on the fields you selected to include in your directory.
9. You can also enter a **Footer** to appear at the bottom of all directory pages.

10. In the **Contact Detail** field, enter text to precede an email link. For example, enter “For more information, contact”.
11. In the **Link text** field, enter text used for the email link.
12. In the **Email** field, enter the email address of the person to use as your organization contact. A link appears on the directory page.
13. Click **Preview** to see how the information you added on this screen appears online.

Based on the information in the preceding example, this is what visitors to your online Professional Directory will see.

Keep in touch
WPA Professional Directory
Updated every two months
Please allow 24 hours for responses.

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Last name	First name	Profession
Search		
☐ Search on business name		

Results

Mr. and Mrs. William H. Smith, Jr., Class of 1980 Industry: Engineering Profession: Programmer Position: Senior Engineer	112 East Main Street Charleston, SC 29411 843.555.1212 AndAdams@Email.Com	XYZ Incorporated 101 Central Ave Charleston, SC 29492 1-800-555-FUND x2233 AndAdams@Contact.Org

WPA Directory

For more information, contact [Beth Smith](#)

14. Click **Next** and move to the Professional Directory Page Style screen, or click **Cancel** to return to the NetSolutions page.

Professional Directory Page Style

This is the fifth procedure in a series of procedures, explaining the Professional Directory Wizard. The following procedures should be used in succession.

- “Professional Page Customization” on page 183
- “Professional Directory Content” on page 185
- “Professional Addressee/Salutations” on page 186
- “Professional Directory Page” on page 189
- “Professional Directory Page Style” on page 191
- “Professional Directory Finish Screen” on page 192

Using the Page Style screen, you can give your directory page a unique look, setting it apart from your other *NetSolutions* pages. The style you established in **Configure and Customize** defaults to all your *NetSolutions* Web pages, but you can change the style for each page using the Page Style screen. The fields and checkboxes available on this screen change based on the **Page section** you select. You can change the background, logo and title, image, header, detail, body, table legend, table headers, table text, and error text styles.

For detailed instructions about each option, see “Changing Page Style” on page 387.

If you are happy with the page style you established in **Configure and Customize**, do not make any changes on this screen, and click **Next** to move to the Professional Directory Finish Screen.

Professional Directory Finish Screen

This is the sixth procedure in a series of procedures, explaining the Professional Directory Wizard. The following procedures should be used in succession.

“Professional Page Customization” on page 183

“Professional Directory Content” on page 185

“Professional Addressee/Salutations” on page 186

“Professional Directory Page” on page 189

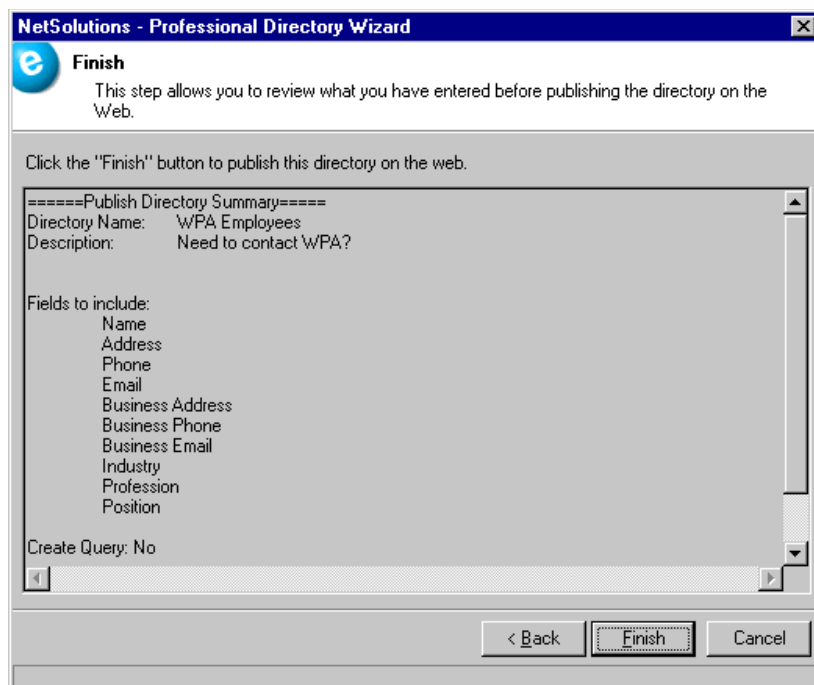
“Professional Directory Page Style” on page 191

“Professional Directory Finish Screen” on page 192

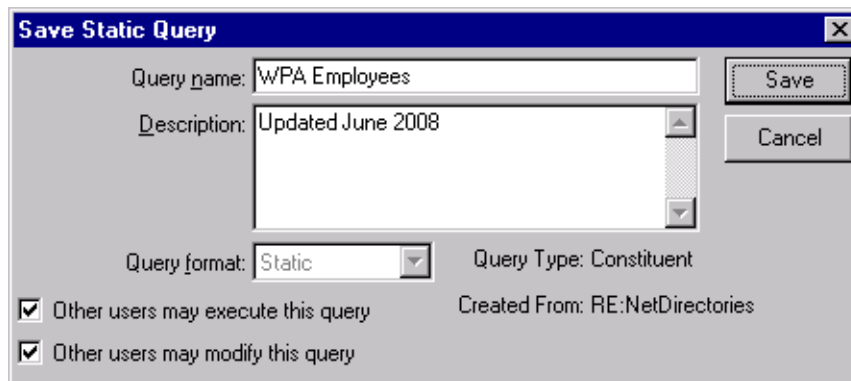
On the Finish screen, you can review all the information you entered in the Professional Directory Wizard.

► Finishing the Professional Directory Wizard

1. After you enter all the necessary information on the various Professional Directory Wizard screens, the Finish screen appears, summarizing all parameter settings you selected for your online directory.



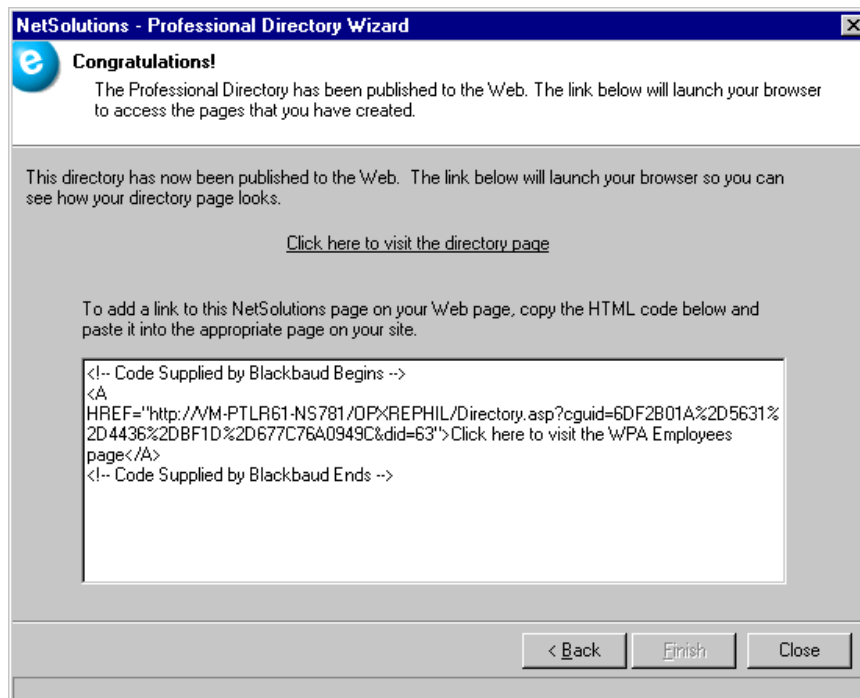
2. Click **Finish**. If you marked the **Create static query** checkbox on the Page Customization screen, the Save Static Query screen appears.



The "Save Static Query" dialog box has a title bar with a close button. It contains the following fields and controls:

- Query name:** A text box containing "WPA Employees".
- Description:** A text box containing "Updated June 2008".
- Query format:** A dropdown menu set to "Static".
- Query Type:** A label showing "Constituent".
- Created From:** A label showing "RE:NetDirectories".
- Permissions:** Two checkboxes, both checked:
 - ☒ Other users may execute this query
 - ☒ Other users may modify this query
- Buttons:** "Save" and "Cancel" buttons.

3. Enter a **Query name**; enter a **Description** to help you remember the details regarding this query. You can also mark the **Other users may execute this query** and **Other users may modify this query** checkboxes, allowing others to work in and change this query.
4. Click **Save**. The directory page is processed. A screen appears with a link to your new online directory page.



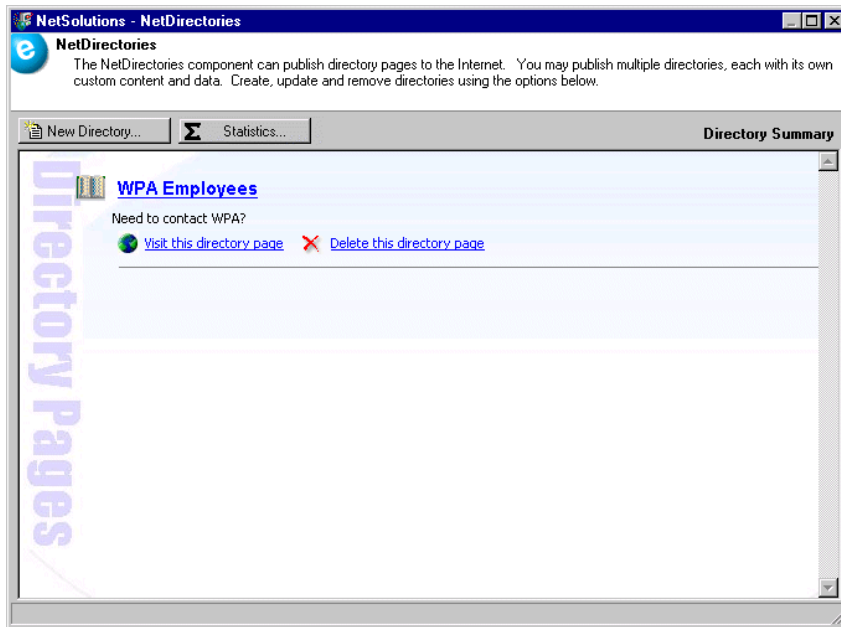
The "NetSolutions - Professional Directory Wizard" window displays a "Congratulations!" message. It includes the following text and elements:

- Header:** "NetSolutions - Professional Directory Wizard" with a close button.
- Message:** "Congratulations! The Professional Directory has been published to the Web. The link below will launch your browser to access the pages that you have created."
- Text:** "This directory has now been published to the Web. The link below will launch your browser so you can see how your directory page looks."
- Link:** "[Click here to visit the directory page](#)"
- Text:** "To add a link to this NetSolutions page on your Web page, copy the HTML code below and paste it into the appropriate page on your site."
- Code Block:**

```
<!-- Code Supplied by Blackbaud Begins -->
<A
  HREF="http://VM-PTLR61-NS781/OPXREPHIL/Directory.asp?cguid=6DF2B01A%2D5631%
  2D4436%2DBF1D%2D677C76A0949C&did=63">Click here to visit the WPA Employees
  page</A>
<!-- Code Supplied by Blackbaud Ends -->
```
- Buttons:** "< Back", "Finish", and "Close".

5. Click the **Click here to visit the directory page** link. The online directory page you just designed appears.
6. To add this directory to your existing Web site, cut and paste the code provided in the box beneath the **Click here to visit the directory page** link.

7. To exit the Professional Directory Wizard screen, click **Close**. You return to the NetSolutions - NetDirectories screen. The new online directory appears as a link on the screen.



8. To close the NetSolutions - NetDirectories screen and return to the NetSolutions page, click the “X” in the upper right corner of the screen.

Publishing a Constituent Directory on Your Web Site

With **NetDirectories**, you can take constituent information from your database and create an online directory. You can make selected address, telephone, and email information from *The Raiser’s Edge* available on your Web site. The type of directory selected determines the information you can select to include.

The directory Web page is hosted by Blackbaud but formatted based on your selections in **Configure and Customize** and **NetDirectories**. For more information, see “Configure & Customize” on page 11.

Constituent Page Customization

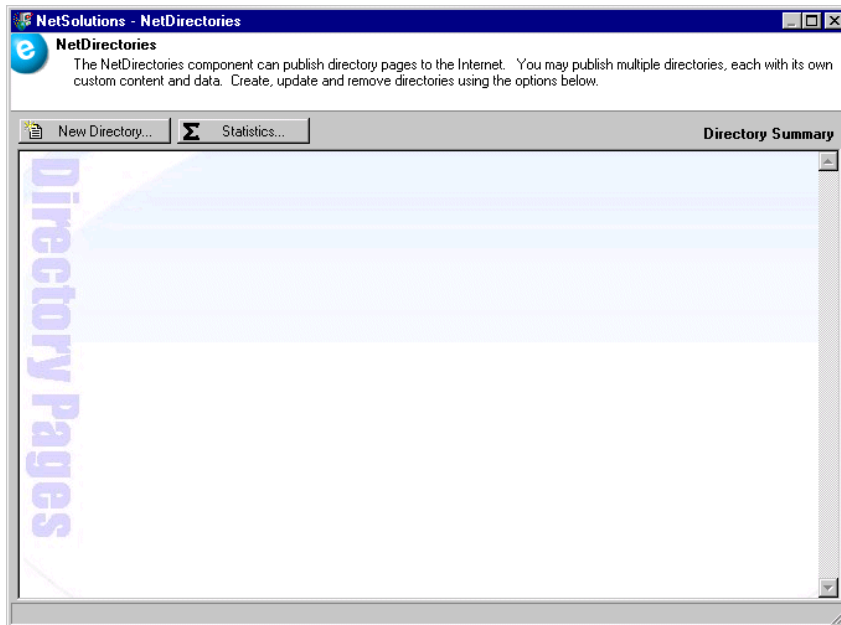
This is the first procedure in a series of procedures, explaining the Constituent Directory Wizard. The following procedures should be used in succession.

- “Constituent Page Customization” on page 194
- “Constituent Directory Content” on page 196
- “Constituent Addressee/Salutations” on page 197
- “Constituent Directory Page” on page 200
- “Constituent Directory Page Style” on page 202
- “Constituent Directory Finish Screen” on page 202

On the Page Customization screen, select the query of records to include in your online directory. You also must enter a directory name and description.

► **Filling out the Constituent Directory Page Customization screen**

1. On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **NetDirectories**. The NetSolutions - NetDirectories screen appears.



3. Click **New Directory**, and select **Constituent Directory**. The Constituent Directory Wizard screen appears.

Before you can complete this screen, you must have a query saved. It must include all records you want available in the online directory.

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

4. In the **Constituent query** field, select the query to include. Click the binoculars to access the Open Query screen.

The screenshot shows the 'Open Query' dialog box. It features a search bar at the top with the text 'Find: Queries'. Below this is a large, empty rectangular area for displaying search results. To the right of this area is a vertical column of buttons: 'Open', 'Cancel', 'Edit', 'Options', 'Find Now', 'New Search', 'Previous Search', and 'Expand Results'. At the bottom of the dialog, there are several search criteria fields: 'Query type:' (set to 'Constituent'), 'Query format:', 'Query name:', 'Description:', 'Created On:', and 'Created by:'. There are also two checkboxes at the bottom left: 'Show merged queries only' and 'Exact match only'.

You can use the Open Query screen to search for an existing query. You can enter the criteria to use to filter the results. For example, you can limit a search to constituent queries, queries created by a specific person, or created on a specific date. To open a record, select the record and click **Open**. You return to the Constituent Directory Wizard screen.

5. To generate a query of records posted on the online directory, mark the **Create static query** checkbox.
6. Enter a **Directory name**. This name appears as a link on the NetSolutions - NetDirectories page. You can click the link to open Constituent Directory Wizard and view or change the information included on your *NetSolutions* directory Web page.
7. Enter a **Description** of the directory to appear under the **Directory name** on the NetSolutions - NetDirectories page. There is a 1,024 character limit.
8. Click **Next** and move to the Constituent Directory Content screen, or click **Cancel** to return to the NetSolutions page.

Constituent Directory Content

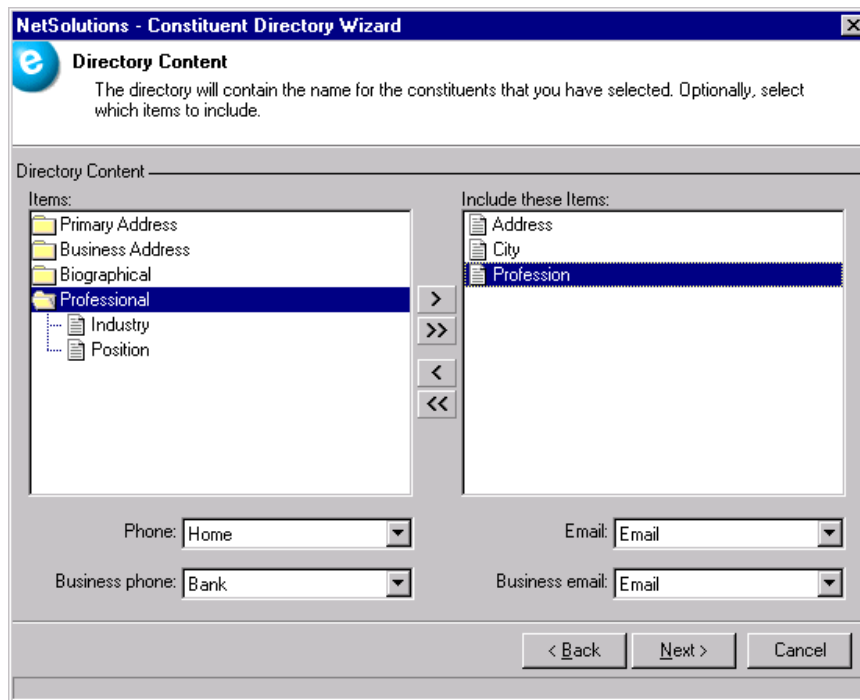
This is the second procedure in a series of procedures, explaining the Constituent Directory Wizard. The following procedures should be used in succession.

- “Constituent Page Customization” on page 194
- “Constituent Directory Content” on page 196
- “Constituent Addressee/Salutations” on page 197
- “Constituent Directory Page” on page 200
- “Constituent Directory Page Style” on page 202
- “Constituent Directory Finish Screen” on page 202

On the Directory Content screen, select all information to include in your online directory. If the constituent record includes the items you select on this screen, the information is included with the directory.

► **Customizing the Constituent Directory Content screen**

1. Once you complete the Page Customization screen, click **Next**. The Directory Content screen appears.



2. The **Items** box contains all information available to include in your online directory. The **Include these Items** box contains all items selected to be included in the online directory.
If you do not want to include an item from the **Include these Items** box, select the item to remove and click the left arrow button.
To add an item from the **Items** box, select the item to include and click the right arrow button.
3. In the **Phone** field, select the Phone type to include in the directory. The options available depend on the phone types created in the **Phone Types** table in *Configuration*. For more information, see the Configuration chapter of the *Configuration and Security Guide*.
4. In the **Email** field, select the email type to include in the directory. The options available depend on the phone types created in the **Phone Types** table in *Configuration*. For more information, see the Configuration chapter of the *Configuration and Security Guide*.
5. In the **Business phone** field, select the business phone type to include in the directory. The options available depend on the phone types created in the **Phone Types** table in *Configuration*. For more information, see the Configuration chapter of the *Configuration and Security Guide*.
6. In the **Business email** field, select the business email type to include in the directory. The options available depend on the phone types created in the **Phone Types** table in *Configuration*. For more information, see the Configuration chapter of the *Configuration and Security Guide*.
7. Click **Next** and move to the Constituent Addressee/Salutations screen, or click **Cancel** to return to the NetSolutions page.

Constituent Addressee/Salutations

This is the third procedure in a series of procedures, explaining the Constituent Directory Wizard. The following procedures should be used in succession.

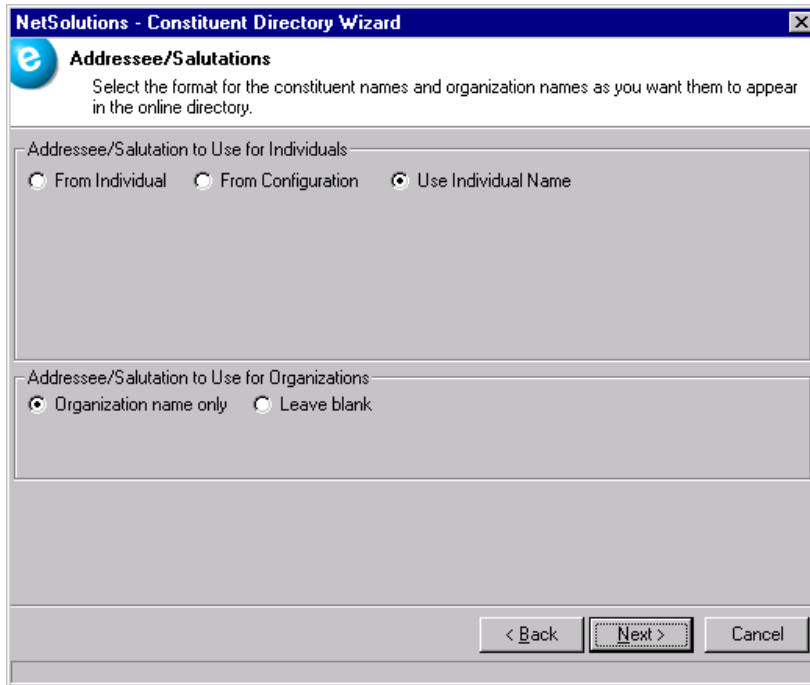
- “Constituent Page Customization” on page 194

- “Constituent Directory Content” on page 196
- “Constituent Addressee/Salutations” on page 197
- “Constituent Directory Page” on page 200
- “Constituent Directory Page Style” on page 202
- “Constituent Directory Finish Screen” on page 202

On the Addressee/Salutations screen, select the addressee/salutation format to use with names in your online directory.

► **Customizing the Constituent Directory Addressee/Salutation screen**

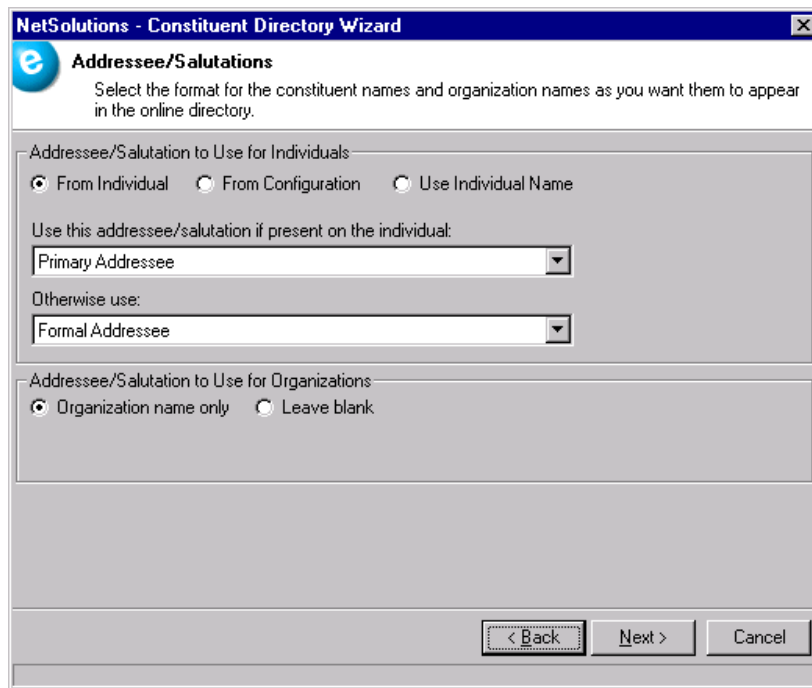
1. Once you complete Directory Content screen, click **Next**. A screen appears asking you to select an Addressee/Salutation format for your online directory.



The screenshot shows a window titled "NetSolutions - Constituent Directory Wizard" with a close button (X) in the top right corner. The window has a blue header bar with a white "e" logo and the text "Addressee/Salutations". Below the header, there is a instruction: "Select the format for the constituent names and organization names as you want them to appear in the online directory." The main area of the window is divided into two sections. The first section is titled "Addressee/Salutation to Use for Individuals" and contains three radio buttons: "From Individual", "From Configuration", and "Use Individual Name". The "Use Individual Name" radio button is selected. The second section is titled "Addressee/Salutation to Use for Organizations" and contains two radio buttons: "Organization name only" and "Leave blank". The "Organization name only" radio button is selected. At the bottom of the window, there are three buttons: "< Back", "Next >", and "Cancel". The "Next >" button is highlighted with a dashed border.

2. In the **Addressee/Salutation to Use for Individuals** frame, if you select **Use Individual Name**, no addressee/salutation is used in the directory; only the individual's name appears.

If you select **From Individual**, the addressee/salutation used in your online directory is based on information entered on the individual's constituent record.



The image shows a screenshot of the 'NetSolutions - Constituent Directory Wizard' window, specifically the 'Addressee/Salutations' step. The window has a blue title bar and a small 'e' logo. The main text says 'Select the format for the constituent names and organization names as you want them to appear in the online directory.' There are two main sections. The first section, 'Addressee/Salutation to Use for Individuals', has three radio buttons: 'From Individual' (selected), 'From Configuration', and 'Use Individual Name'. Below these are two dropdown menus: 'Use this addressee/salutation if present on the individual:' with 'Primary Addressee' selected, and 'Otherwise use:' with 'Formal Addressee' selected. The second section, 'Addressee/Salutation to Use for Organizations', has two radio buttons: 'Organization name only' (selected) and 'Leave blank'. At the bottom right are three buttons: '< Back', 'Next >', and 'Cancel'.

In the **Use this addressee/salutation if present on the individual** field, enter the addressee/salutation the program should look for first. If the program does not find your first choice on the individual's record, it will use the addressee/salutation selected in the **Otherwise use** field. If neither is present, the individual name is used.

Note: For more information about addressee/salutation information entered in *Configuration*, see the Configuration chapter in the *Configuration & Security Guide*.

If you select **From Configuration**, the addressee/salutation used in your online directory is based on information entered in *Configuration*.

In the **Use this addressee/salutation from Configuration** field, select the addressee/salutation the program should use. All selections entered through **Business Rules** in *Configuration* are available.

3. In the **Addressee/Salutation to Use for Organizations** frame, you can select the **Organization name only** or **Leave blank**.
4. Click **Next** and move to the Constituent Directory Page screen, or click **Cancel** to return to the NetSolutions page.

Constituent Directory Page

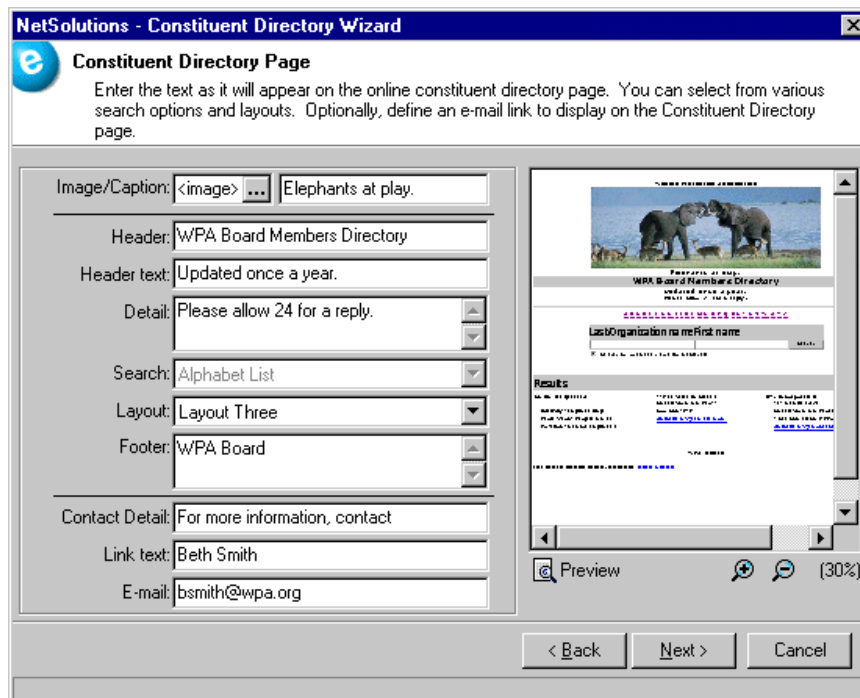
This is the fourth procedure in a series of procedures, explaining the Constituent Directory Wizard. The following procedures should be used in succession.

- “Constituent Page Customization” on page 194
- “Constituent Directory Content” on page 196
- “Constituent Addressee/Salutations” on page 197
- “Constituent Directory Page” on page 200
- “Constituent Directory Page Style” on page 202
- “Constituent Directory Finish Screen” on page 202

On the Directory Pages screen, you can enter detailed formatting information for your online directory page. You can enter a header, detail information, search options, layout information, footers, and more.

► Customizing the Constituent Directory page

1. Once you complete the Addressee/Salutation screen, click **Next**. The Constituent Directory Page appears.



2. In the first **Image/Caption** field, you can include an image on your online directory page. Click the ellipsis to access the Open screen.

Select the image file to include on the online directory page, and click **Open** to return to the Constituent Directory Wizard screen.

3. In the second **Image/Caption** field, you can enter a caption to appear under the image.

Note: For more information on adding your logo to the directory Web page, see “Configuring Your Web Pages” on page 23.

4. Enter a **Header**. This appears at the top of your online directory page, under the **Title** information you entered in **Configure and Customize**.
5. Enter any **Header text**. This is an explanation to appear under the **Header**.
6. In the **Detail** box, enter any additional directory information.
7. The **Search** field is disabled for constituent directories. “Alphabet List” is the only option.
8. In the **Layout** field, select the number of columns used to display results.
 - “Layout One”: Displays results in one column.
 - “Layout Two”: May display results in two columns, depending on the fields you selected to include in your directory.
 - “Layout Three”: May display results in three columns, depending on the fields you selected to include in your directory.
9. You can also enter a **Footer** to appear at the bottom of all directory pages.
10. In the **Contact Detail** field, enter text to precede an email link. For example, enter “For more information, contact”.
11. In the **Link text** field, enter text used for the email link.

12. In the **Email** field, enter the email address of the person to use as your organization contact. A link appears on the directory page.
13. Click **Preview** to see how the information you added on this screen appears online.

Based on the information in the preceding example, this is what visitors to your online Alumni Directory will see.

Elephants at play.

WPA Board Members Directory

*Updated once a year.
Please allow 24 for a reply.*

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Last/Organization name **First name**

☐ Search on business name for individuals

Results

Smith, Margaret A. Industry: Engineering Profession: Programmer Position: Senior Engineer	112 East Main Street Charleston, SC 29411 843-555-1212 AndAdams@Email.Com	XYZ Incorporated 101 Central Ave Charleston, SC 29492 1-800-555-FUND x2233 AndAdams@Contact.Org

WPA Board

For more information, contact [Beth Smith](#)

14. Click **Next** and move to the Constituent Directory Page Style screen, or click **Cancel** to return to the NetSolutions page.

Constituent Directory Page Style

This is the fifth procedure in a series of procedures, explaining the Constituent Directory Wizard. The following procedures should be used in succession.

- “Professional Page Customization” on page 183
- “Professional Directory Content” on page 185
- “Professional Addressee/Salutations” on page 186
- “Professional Directory Page” on page 189
- “Professional Directory Page Style” on page 191
- “Professional Directory Finish Screen” on page 192

Using the Page Style screen, you can give your directory page a unique look, setting it apart from your other *NetSolutions* Web pages. The style you established in **Configure and Customize** defaults to all your *NetSolutions* Web pages, but you can change the style for each page using the Page Style screen. The fields and checkboxes available on this screen change based on the **Page section** you select. You can change the background, logo and title, image, header, detail, body, table legend, table headers, table text, and error text styles.

For detailed instructions about each option, see “Changing Page Style” on page 387.

If you are happy with the page style you established in **Configure and Customize**, do not make any changes on this screen, and click **Next** to move to the Constituent Directory Finish Screen.

Constituent Directory Finish Screen

This is the sixth procedure in a series of procedures, explaining the Constituent Directory Wizard. The following procedures should be used in succession.

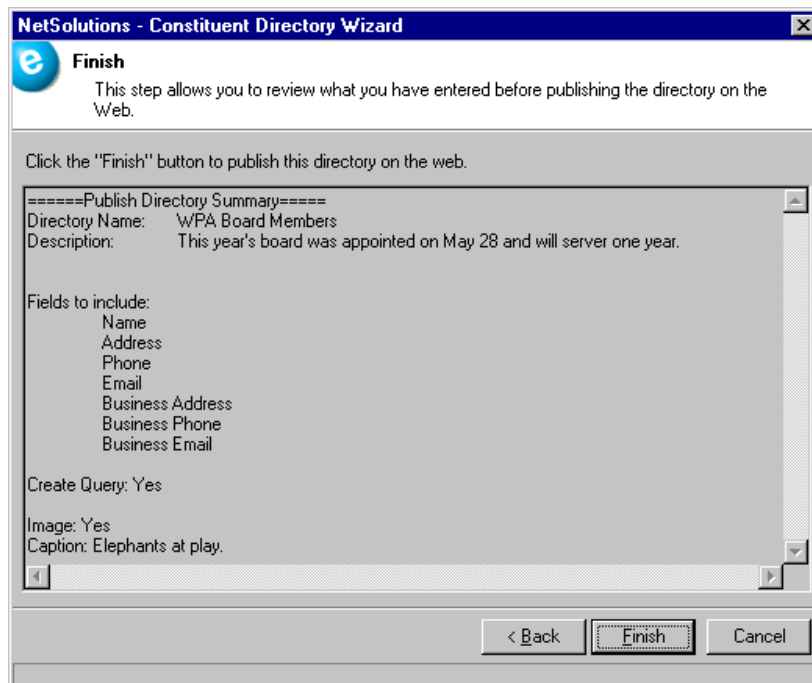
- “Professional Page Customization” on page 183

- “Professional Directory Content” on page 185
- “Professional Addressee/Salutations” on page 186
- “Professional Directory Page” on page 189
- “Professional Directory Page Style” on page 191
- “Professional Directory Finish Screen” on page 192

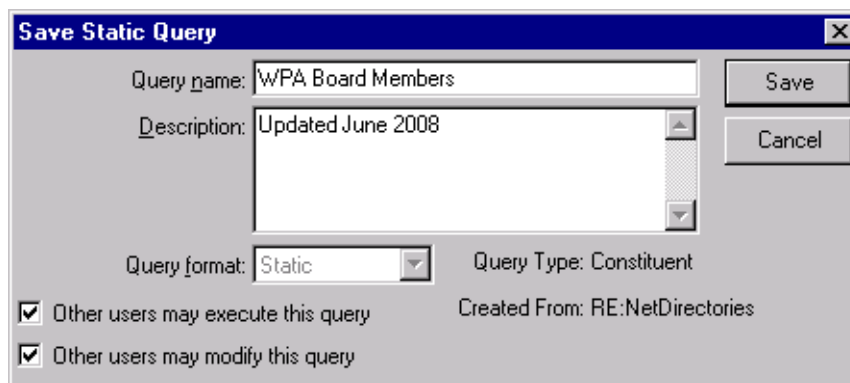
On the Finish screen, you can review all the information you entered in the Constituent Directory Wizard.

► Completing the Constituent Directory Finish screen

1. After you enter all the necessary information on the various Constituent Directory Wizard screens, the Finish screen appears, summarizing all parameter settings you selected for your online directory.

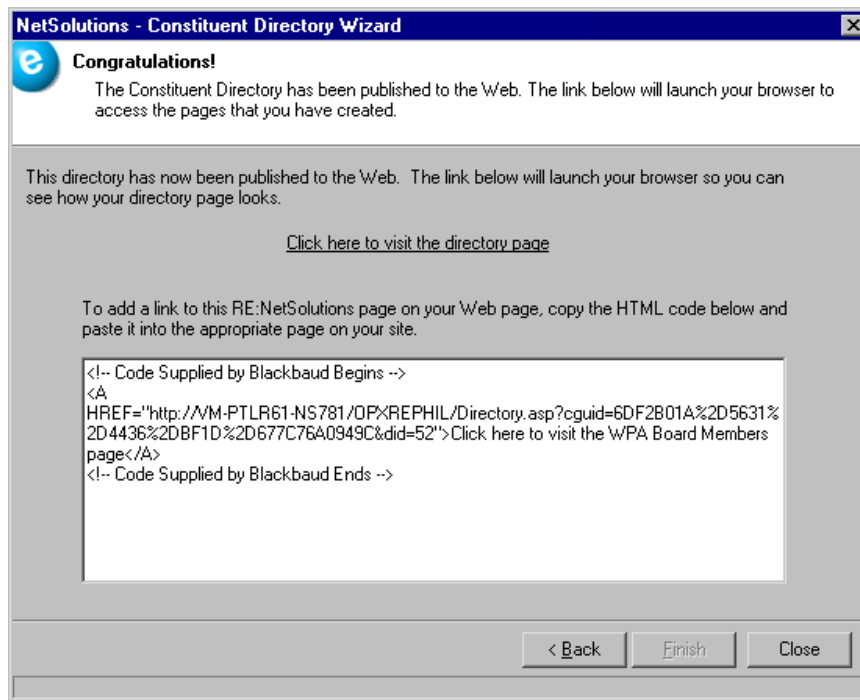


2. Click **Finish**. If you marked the **Create static query** checkbox on the Page Customization screen, the Save Static Query screen appears.

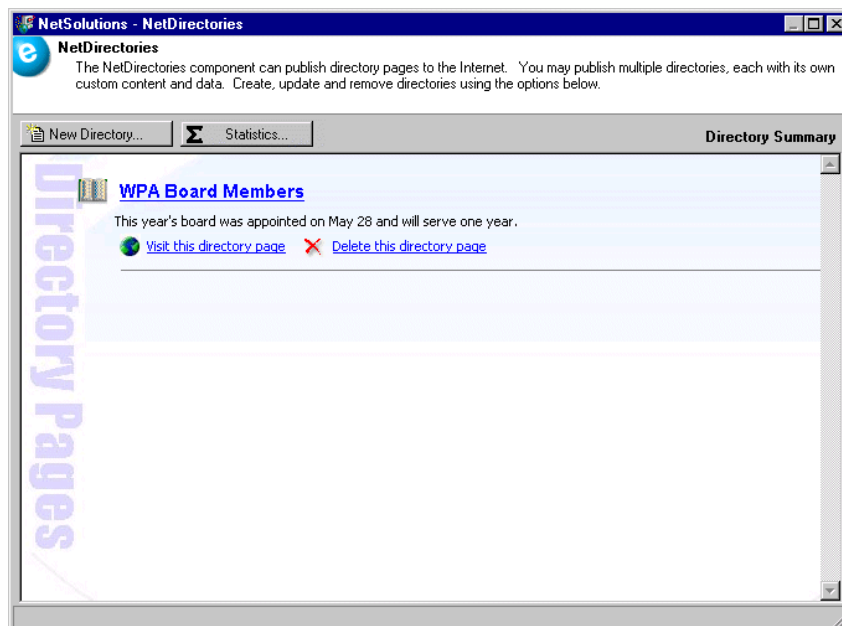


3. Enter a **Query name**; enter a **Description** to help you remember the details regarding this query. You can also mark the **Other users may execute this query** and **Other users may modify this query** checkboxes, allowing others to work in and change this query.

- Click **Save**. The directory page is processed. A screen appears offering a link to your new online directory page.



- Click the **Click here to visit the directory page** link. The online directory page you just designed appears.
- To add this directory to your existing Web site, cut and paste the code provided in the box beneath the **Click here to visit the directory page** link.
- To exit the Constituent Directory Wizard screen, click **Close**. You return to the NetSolutions - NetDirectories screen. The new online directory appears as a link on the screen.



- To close the NetSolutions - NetDirectories screen and return to the NetSolutions page, click the "X" in the upper right corner of the screen.

Publishing a Donor Recognition Page on Your Web Site

With **NetDirectories**, you can use your Web site to recognize outstanding donors, using information from your **Raiser's Edge** database. To create a donor recognition page, you simply create a **Donor Category Report** in **Reports**. The report must include all records and information you want to include on your Web page. After you have the report created and saved, go to **NetDirectories** and create your donor recognition page.

The recognition page is hosted by Blackbaud but formatted based on your selections in **Configure and Customize** and **NetDirectories**. For more information, see "Configure & Customize" on page 11.

Donor Recognition Page Customization

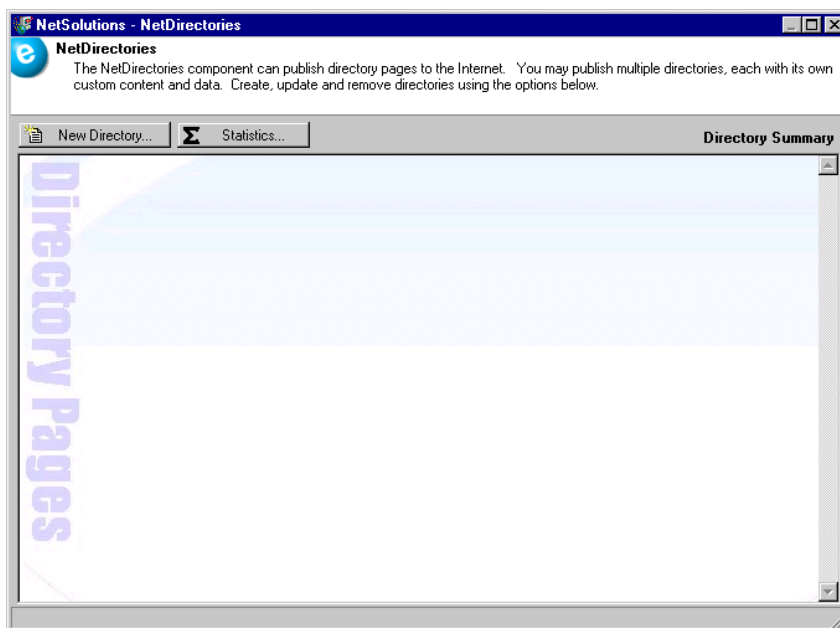
This is the first procedure in a series of procedures, explaining the Donor Recognition Page Wizard. The following procedures should be used in succession.

- "Donor Recognition Page Customization" on page 205
- "Donor Recognition Page Addressee/Salutations" on page 206
- "Donor Recognition Page" on page 208
- "Donor Recognition Page Style" on page 210
- "Donor Recognition Page Finish" on page 210

On the Page Customization screen, select the query of records to include in your recognition page. You also must enter a page name and description.

► Completing the Donor Recognition page Customization screen

1. On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **NetDirectories**. The NetSolutions - NetDirectories screen appears.



3. Click **New Directory** and select **Donor Recognition Page**. The Page Customization screen appears.

The screenshot shows a window titled "NetSolutions - Donor Recognition page Wizard" with a sub-header "Page Customization". Below the header, there is a text box with instructions: "This wizard helps you publish a Donor Recognition page to the Web. Select the Donor Category Report on which to base your page. Also, enter the name and description of the Donor Recognition page as you want them to appear on the Web." Below this, there are three input fields: "Report name:" with a dropdown menu showing "Donor Recognition", "Directory name:" with a text box containing "Top 10 Donors!", and "Description:" with a text box containing "Updated every two months." At the bottom of the window, there are three buttons: "< Back", "Next >", and "Cancel".

Before you can complete this screen, you must have a Donor Category report saved. It must include all records and information you want available in your online page.

Note: For information about creating reports in *The Raiser's Edge*, see the *Reports Guide*.

4. In the **Record name** field, select the **Donor Category Report** to use in your donor recognition page.
5. Enter a **Directory name**. This name appears as a link on the NetSolutions - NetDirectories page. You can click the link to open the Donor Recognition page Wizard and view or change the information included on your *NetSolutions* Web page.
6. Enter a **Description** of the page to appear under the **Directory name** on the NetSolutions - NetDirectories page. There is a 1,024 character limit.
7. Click **Next** and move to the Donor Recognition Page Addressee/Salutations screen, or click **Cancel** to return to the NetSolutions page.

Donor Recognition Page Addressee/Salutations

This is the second procedure in a series of procedures, explaining the Donor Recognition Page Wizard. The following procedures should be used in succession.

- "Donor Recognition Page Customization" on page 205
- "Donor Recognition Page Addressee/Salutations" on page 206
- "Donor Recognition Page" on page 208
- "Donor Recognition Page Style" on page 210
- "Donor Recognition Page Finish" on page 210

On the Addressee/Salutations screen, select the addressee/salutation format to use with names in your online donor recognition page.

► **Customizing the Donor Recognition page Addressee/Salutations screen**

1. Once you complete Page Customization screen, click **Next**. The Addressee/Salutations screen appears.

NetSolutions - Donor Recognition page Wizard

Addressee/Salutations
Select the format for the constituent names as you want them to appear on the Donor Recognition page.

Addressee/Salutation to use for Individuals

☐ From Individual ☐ From Configuration ☒ Use Individual Name

< Back Next > Cancel

2. If you select **Use Individual Name**, no addressee/salutation is used; only the individual's name appears.
3. If you select **From Individual**, the addressee/salutation used is based on information entered in the individual's constituent record.

NetSolutions - Donor Recognition page Wizard

Addressee/Salutations
Select the format for the constituent names as you want them to appear on the Donor Recognition page.

Addressee/Salutation to use for Individuals

☒ From Individual ☐ From Configuration ☐ Use Individual Name

Use this addressee/salutation if present on the individual:

Primary Addressee

Otherwise use:

Primary Salutation

< Back Next > Cancel

In the **Use this addressee/salutation if present on the individual** field, enter the addressee/salutation the program should look for first. If the program does not find your first choice on the individual's record, it uses the addressee/salutation selected in the **Otherwise use** field. If neither is present, the individual name is used.

Note: For more information about addressee/salutation information, see the Configuration chapter in the *Configuration & Security Guide*.

4. If you select **From Configuration**, the addressee/salutation used is based on information entered in *Configuration*.

NetSolutions - Donor Recognition page Wizard

Addressee/Salutations
Select the format for the constituent names as you want them to appear on the Donor Recognition page.

Addressee/Salutation to use for Individuals

☐ From Individual
 ☒ From Configuration
 ☐ Use Individual Name

Use this addressee/salutation from Configuration:

Mr. and Mrs. William H. Smith, Jr., Class of 1980

< Back Next > Cancel

In the **Use this addressee/salutation from Configuration** field, select the addressee/salutation you want the program to use. All selections entered through **Business Rules** in *Configuration* are available.

5. Click **Next** and move to the Donor Recognition Page screen, or click **Cancel** to return to the NetSolutions page.

Donor Recognition Page

This is the third procedure in a series of procedures, explaining the Donor Recognition Page Wizard. The following procedures should be used in succession.

- “Donor Recognition Page Customization” on page 205
- “Donor Recognition Page Addressee/Salutations” on page 206
- “Donor Recognition Page” on page 208
- “Donor Recognition Page Style” on page 210
- “Donor Recognition Page Finish” on page 210

On the Donor Recognition Page screen you can enter detailed formatting information for your online directory page. You can enter a header, detail information, search options, layout information, footers, and more.

► Customizing the Donor Recognition page screen

1. Once you complete the Addressee/Salutations screen, click **Next**. The Donor Recognition Page appears.

2. In the first **Image/Caption** field, you can include an image on your page. Click the ellipsis to access the Open screen.
Select the image file to include, and click **Open** to return to the Donor Recognition page Wizard screen.
3. In the second **Image/Caption** field, you can enter a caption to appear under the image.

Note: For more information about adding your logo to the directory Web page, see “Configuring Your Web Pages” on page 23.

4. Enter a **Header**. For example, you can enter “Top 10 Donors”. This appears at the top of your online directory page, under the **Title** information you entered in **Configure and Customize**, or if you selected to include an image and caption on the page, it appears under the caption.
5. Enter any **Header text**. This is an explanation to appear under the **Header**.
6. In the **Detail** box, enter any additional donor recognition information.
7. In the **Search** field, select how you want information arranged on your donor recognition page.
 - “Donor category”: The donors are listed under their donor category. For example, if Founder is one of your donor categories, any donor who gave to this category appears under the heading of **Founder**.
 - “Donor category (Amount)”: The donors are listed under their donor category plus the amount associated with each category in your database is also included in the heading. For example, if the Founder category price is \$2,500 in your *Raiser’s Edge* database, **Founder (\$2,500)** appears in the category heading.
 - “Donor category (Low - High)”: The donors are listed under their donor category plus the low amount and high amount associated with each category in your database is also included in the heading. For example, if the Friend category price is \$10 to \$249.99 in your *Raiser’s Edge* database, **Friend (\$10 - \$249.99)** appears in the category heading.
8. In the **Layout** field, select the number of columns used to display results.

- “Layout One”: Displays results in one column.
 - “Layout Two”: Displays results in two columns.
 - “Layout Three”: Displays results in three columns.
 - “Layout Four”: Displays results in four columns.
9. You can also enter a **Footer** to appear at the bottom of the page.
 10. In the **Contact Detail** field, enter text to precede an email link. For example, enter “For more information, contact”.
 11. In the **Link text** field, enter text to use for the email link.
 12. In the **Email** field, enter the email address of the person to use as your organization contact. A link appears on the directory page.
 13. Click **Preview** to see how the information you added on this screen appears online.
 14. Click **Next** and move to the Donor Recognition Page Style screen, or click **Cancel** to return to the NetSolutions page.

Donor Recognition Page Style

This is the fourth procedure in a series of procedures, explaining the Donor Recognition Page Wizard. The following procedures should be used in succession.

- “Donor Recognition Page Customization” on page 205
- “Donor Recognition Page Addressee/Salutations” on page 206
- “Donor Recognition Page” on page 208
- “Donor Recognition Page Style” on page 210
- “Donor Recognition Page Finish” on page 210

Using the Page Style screen, you can give your directory page a unique look, setting it apart from your other *NetSolutions* pages. The style you established in **Configure and Customize** defaults to all your *NetSolutions* Web pages, but you can change the style for each page using the Page Style screen. The fields and checkboxes available on this screen change based on the **Page section** you select. You can change the background, logo and title, image, header, detail, body, table legend, table headers, table text, and error text styles.

For detailed instructions about each option, see “Changing Page Style” on page 387.

If you are happy with the page style you established in **Configure and Customize**, do not make any changes on this screen, and click **Next** to move to Donor Recognition Page Finish.

Donor Recognition Page Finish

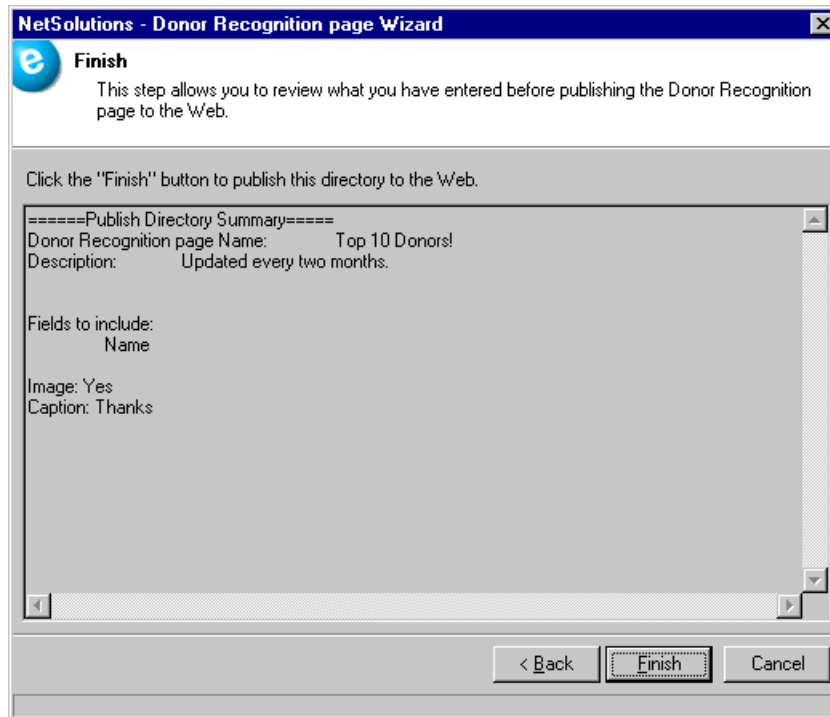
This is the final procedure in a series of procedures, explaining the Donor Recognition Page Wizard. The following procedures should be used in succession.

- “Donor Recognition Page Customization” on page 205
- “Donor Recognition Page Addressee/Salutations” on page 206
- “Donor Recognition Page” on page 208
- “Donor Recognition Page Style” on page 210
- “Donor Recognition Page Finish” on page 210

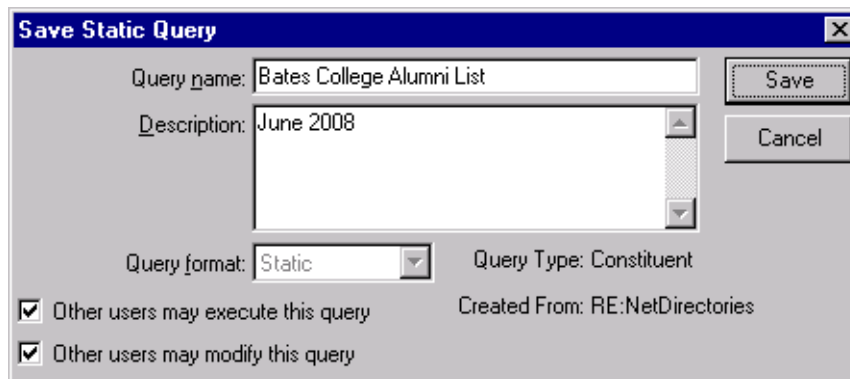
The Finish screen confirms your online directory has been published on the Web. It also includes a link to your new online directory.

► **Completing the Donor Recognition Page Finish screen**

1. After you enter all the necessary information on the various Donor Recognition page Wizard screens, the Finish screen appears, summarizing all parameter settings you selected for your page.

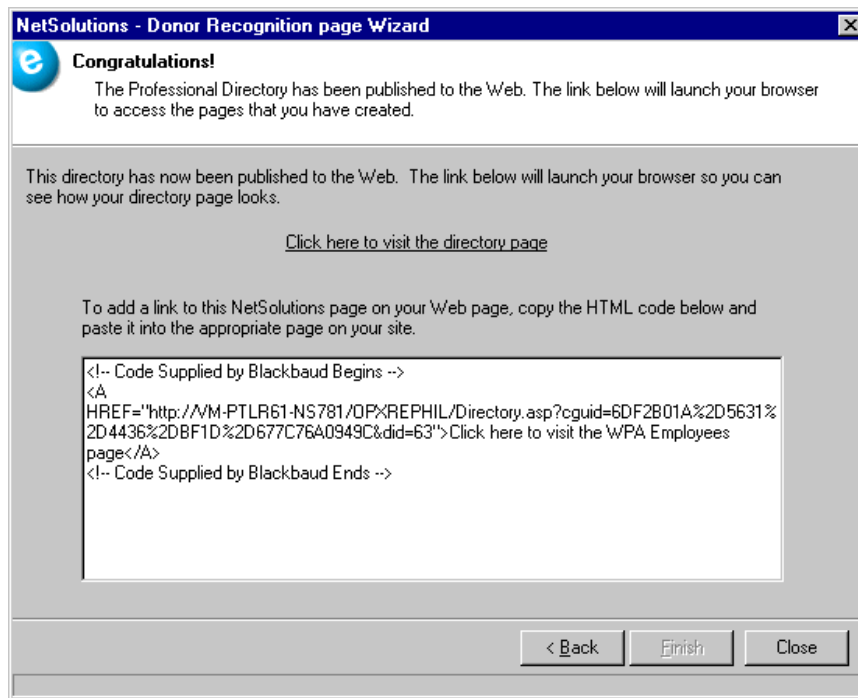


2. Click **Finish**. If you marked the **Create static query** checkbox on the Page Customization screen, the Save Static Query screen appears.

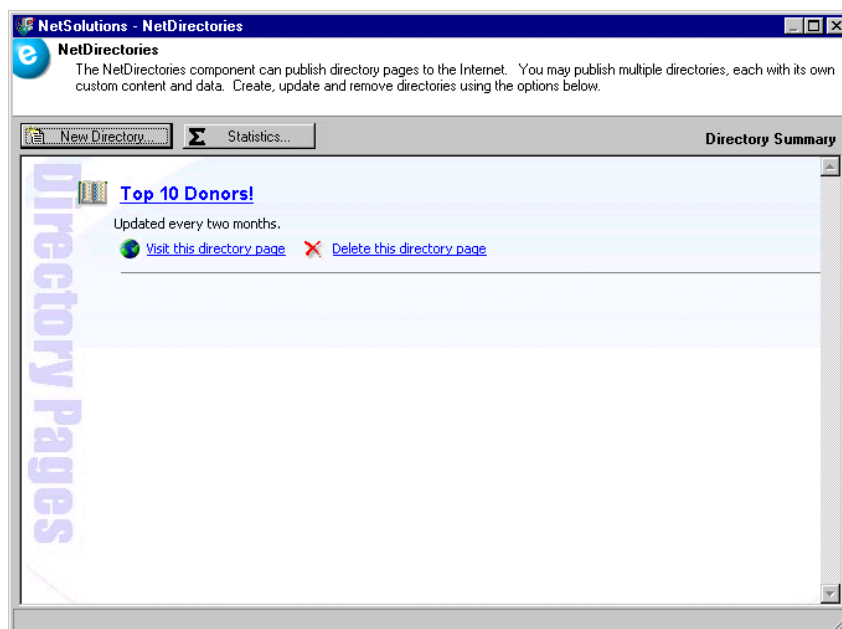


3. Enter a **Query name**; enter a **Description** to help you remember the details regarding this query. You can also mark the **Other users may execute this query** and **Other users may modify this query** checkboxes, allowing others to work in and change this query.

- Click **Save**. The directory page is processed. A screen appears with a link to your new online directory page.



- Click the **Click here to visit the directory page** link. The online directory page you just designed appears.
- To add this directory to your existing Web site, cut and paste the code provided in the box beneath the **Click here to visit the directory page** link.
- To exit the Donor Recognition page Wizard screen, click **Close**. You return to the NetSolutions - NetDirectories screen. The new online donor recognition page appears as a link on the screen.



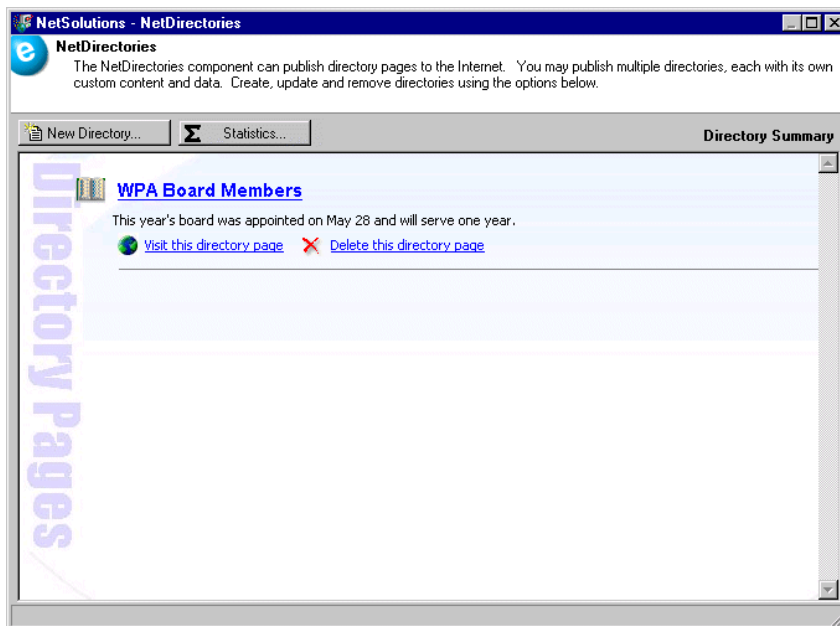
- To close the NetSolutions - NetDirectories screen and return to the NetSolutions page, click the "X" in the upper right corner of the screen.

Viewing a Web Page

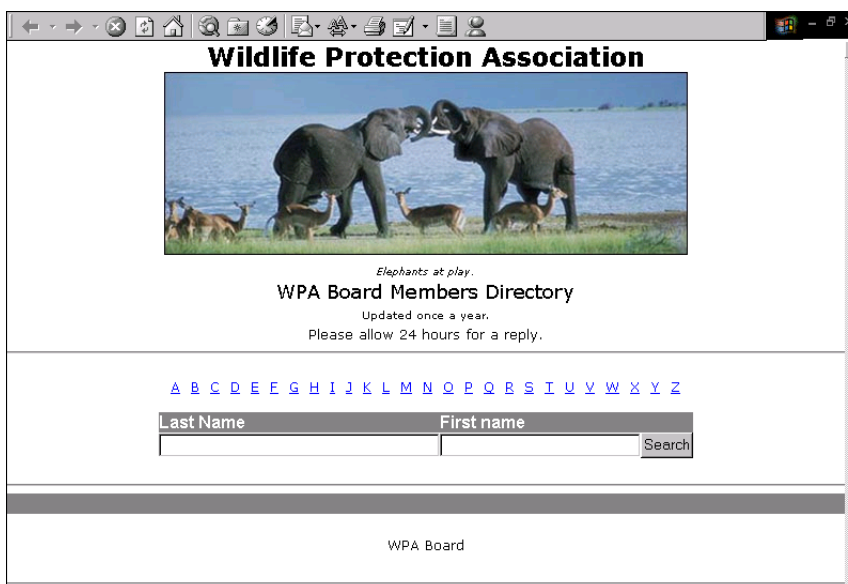
After you create a new page for your Web site, you can access the page anytime through *NetSolutions*. You can preview the page without going online. Working through *NetSolutions*, you can easily make changes to the Web page.

► Viewing a Web page

1. On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **NetDirectories**. The NetSolutions - NetDirectories screen appears.



3. Click the **Visit this directory page** link. The Web page appears.



4. To close this screen, click the "X" in the upper right corner.

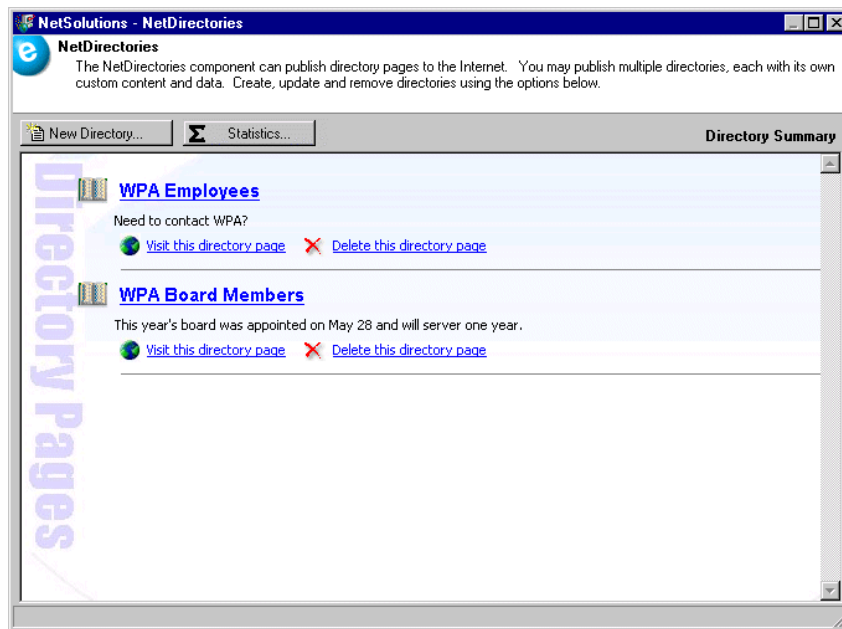
5. To exit the NetSolutions - NetDirectories screen and return to the NetSolutions page, click the "X" in the upper right corner.

Deleting a Page from Your Web Site

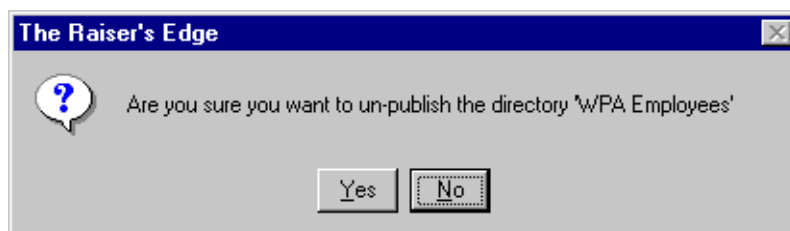
Once a Web page has served its purpose, you can permanently remove it from your Web site.

► Deleting a page from your Web site

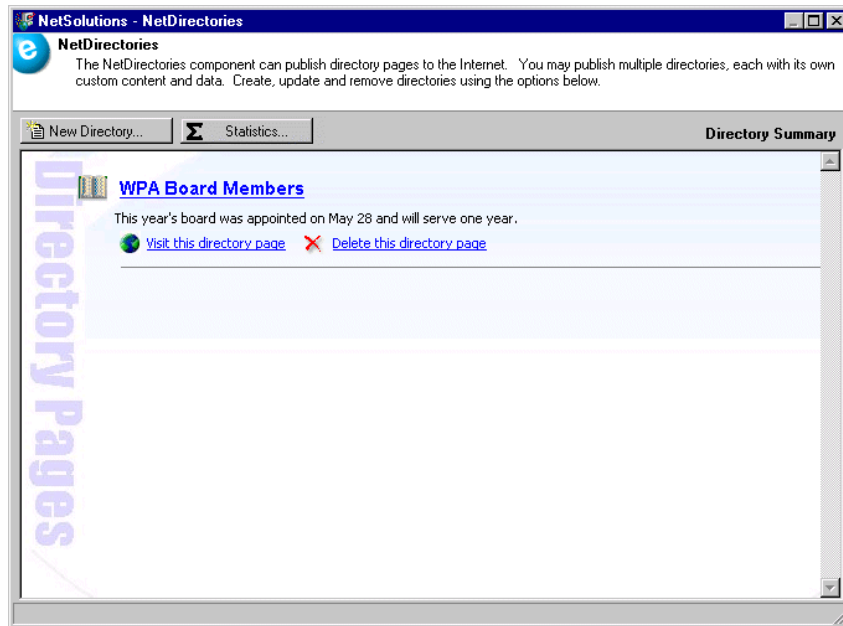
1. On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **NetDirectories**. The NetSolutions - NetDirectories screen appears.



3. Under the Web page link to delete, click **Delete this directory page**. A warning message appears.



4. Click **Yes**. The NetSolutions - NetDirectories screen appears, minus the deleted directory page.



5. To exit this screen and return to the NetSolutions page, click the "X" in the upper right corner.

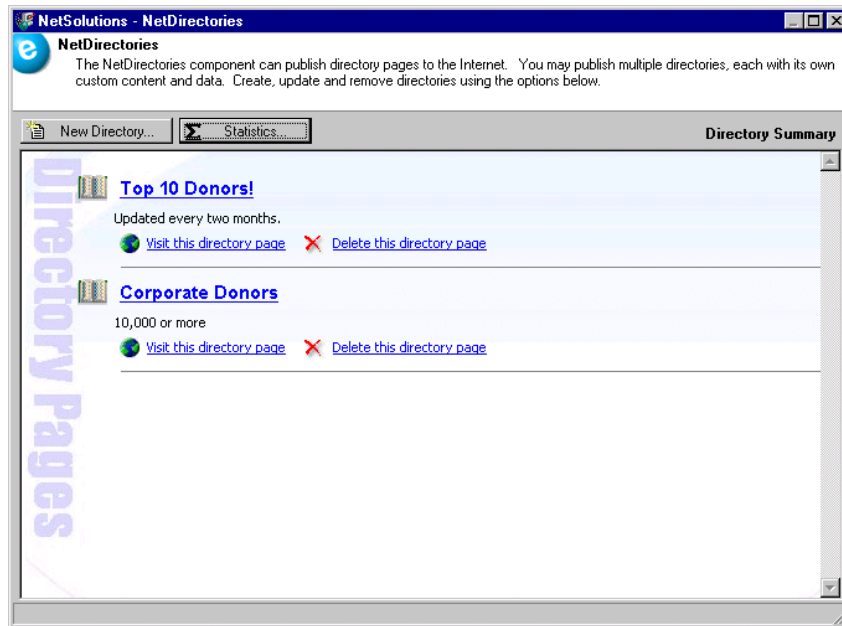
Viewing Directory Page Statistics

NetSolutions keeps track of how many times your online directory pages are visited and the number of searches on each page. Through the **Statistics** button on the NetSolutions - NetDirectories screen, you can view and print charts tracking this information.

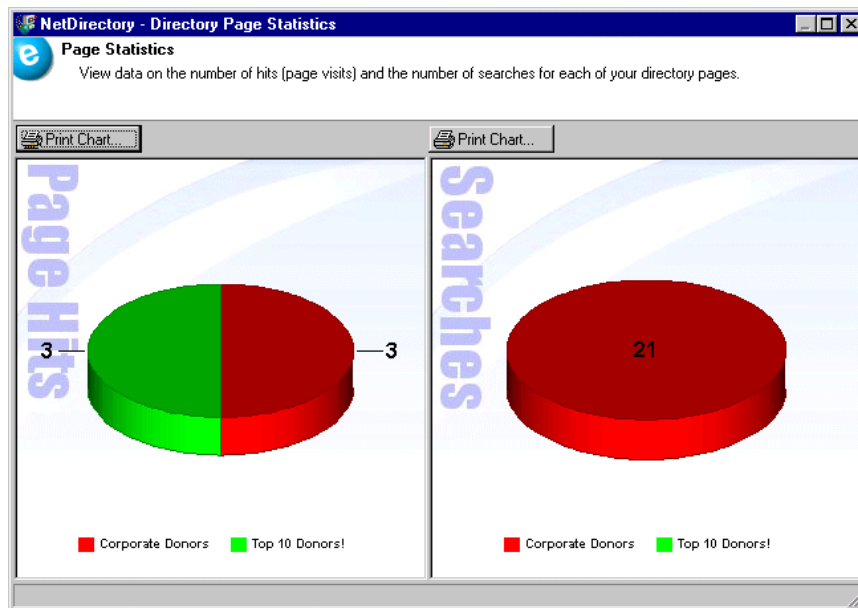
► Viewing directory page statistics

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

2. Click **NetDirectories**. The NetSolutions - NetDirectories screen appears.



3. Click the **Statistics** button. The Directory Page Statistics screen appears.



4. On the left side of the screen, a graph appears showing you the number of times someone visited your directory page.
5. On the right side of the screen, a graph appears showing you the number of searches conducted on each directory page.
6. Click **Print Chart** above each graph to print the graph.
7. To close the screen and return to the NetSolutions - NetDirectories screen, click the "X" in the upper right corner.

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Warning: Before you start working in **NetVolunteers**, we recommend you familiarize yourself with the *Volunteer Management* module and the *Volunteers & Jobs Data Entry Guide*.

With **NetVolunteers**, you can publicize volunteer opportunities available with your organization on your Web site. You can create an online volunteer registration form, advertising as many volunteer positions as you want; and you can create a Web page for specific volunteer jobs, such as Volunteer Coordinator or Special Events Coordinator, using the job information entered in the **Raiser's Edge** database.

If, while visiting your online job or volunteer registration page, visitors submit information, you can download this information for use in **The Raiser's Edge**. Using the **Download Transactions** link, you bring the online information into the system and commit the new information to the proper records in **The Raiser's Edge**.

Also, even though Blackbaud hosts your *NetSolutions* Web pages, you can control the design and content of these pages. Through **Configure and Customize** and **NetVolunteers**, you can select page and font colors, add images, include titles and descriptions, and much more.

This chapter includes detailed procedures about working in **NetVolunteers**. For more information about the **Configure and Customize** link, see "Configure & Customize" on page 11. For information about downloading online transactions into **The Raiser's Edge**, see "Downloading Transactions" on page 295.

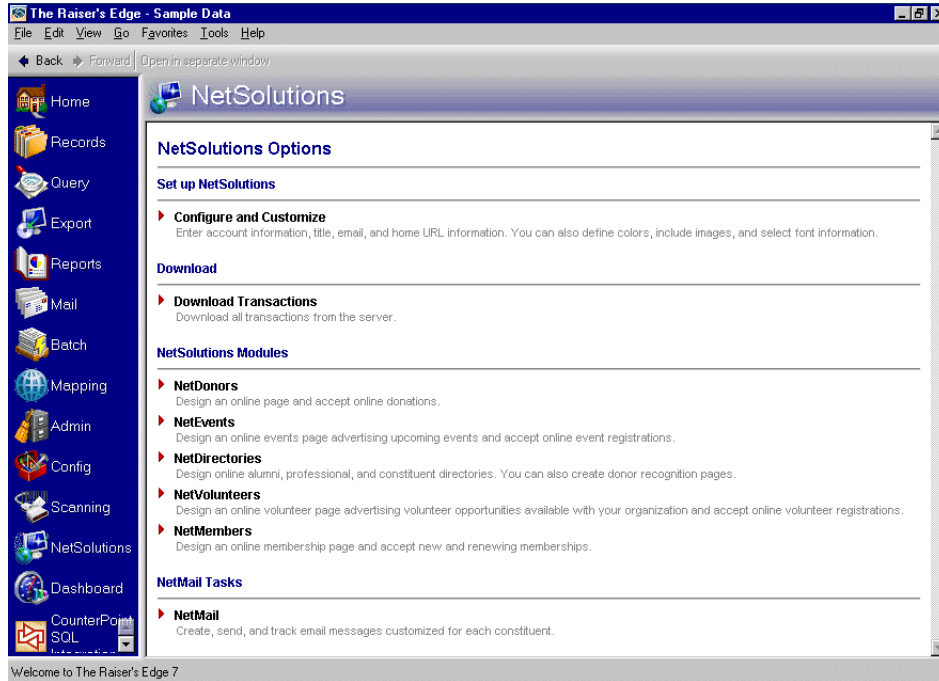
Requirements for NetVolunteers

To use **NetVolunteers**, you must have the following:

- A Web page.
- *Internet Explorer* 5.x or higher is fully supported; however donors can use HTML 3.2 compliant browsers as well
- **The Raiser's Edge 7.x**
- *Volunteer Management*.

Navigating

In *The Raiser's Edge*, you access **NetVolunteers** by clicking **NetSolutions** on the Raiser's Edge bar.



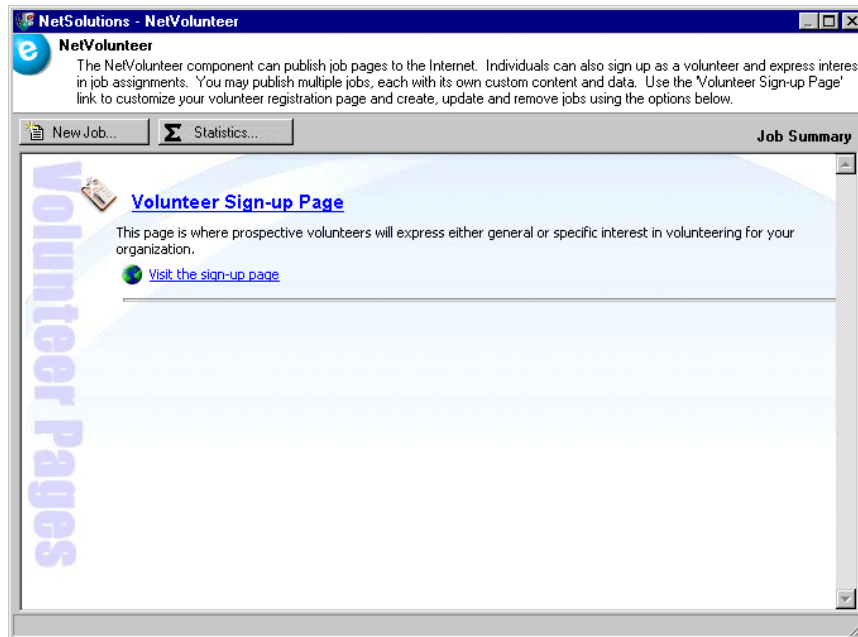
Accessing NetVolunteers

Multiple users can access different areas of *NetSolutions* simultaneously.

► Accessing NetVolunteers

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

2. Click **NetVolunteers**. The NetSolutions - NetVolunteer screen appears.

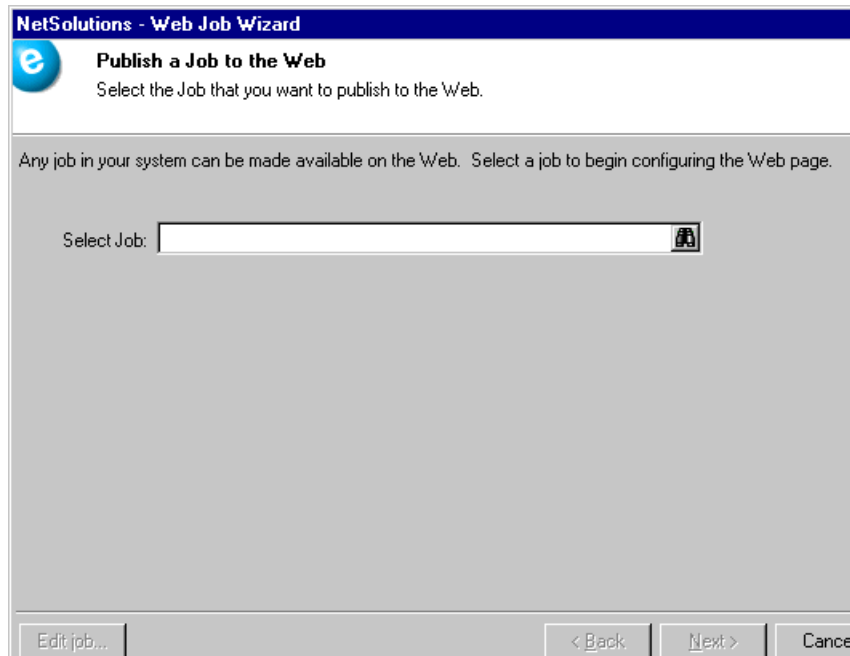


The first time you open **NetVolunteers**, only the **Volunteer Sign-up Page** link appears.

3. Visitors to your Web site can use this page to inquire about volunteer opportunities. To customize the sign-up page, click the **Volunteer Sign-up Page** link. The Volunteer Sign-up Page Wizard screen appears.

For instructions on completing this wizard, see “Publishing a Volunteer Registration Form to Your Web Site” on page 223.

4. To publish specific volunteer job opportunities on your Web site, on the NetSolutions - NetVolunteer screen, click **New Job**. The Web Job Wizard screen appears.



For information about completing this wizard, see “Publishing a Job to Your Web Site” on page 236.

5. To open an existing online job page, from the NetVolunteer screen, click the page title link. In this example, click **Special Events Coordinator**.



6. To visit an existing online job page, click **Visit this job page**.
7. To delete an online job page, click **Delete this job page**.
8. To view statistics on a specific job page, under the job title link, click **Page Statistics**.
9. To view statistics on all job pages, click the **Statistics** button.
10. To exit this screen, click the “X” in the upper right corner. You return to the NetSolutions page.

Buttons

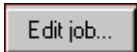
In **NetVolunteers**, *three* buttons help you navigate through the program.



The **New job** button on the NetSolutions - NetVolunteer Screen opens the Web Job Wizard, where you enter information for a new online job page.



The **Statistics** button on the NetSolutions - NetVolunteer screen generates a chart, tracking the number of volunteers registered for each online job page.



The **Edit Job** button on the Web Job Wizard screen opens the job record in *The Raiser's Edge*. You can make necessary changes to the job record before publishing it to your Web site. This button is available only in a saved and reopened job.

Publishing a Volunteer Registration Form to Your Web Site

With **NetVolunteers**, visitors to your Web site can volunteer to work for your organization. The form requires they enter biographical information, such as name, address, and telephone number. Also, based on the selections you make when designing your online form, potential volunteers can select the assignments they are interested in and when they are available to work.

Volunteer Registration Page

This is the first procedure in a series of procedures, explaining the Volunteer Sign-up Page Wizard. The following procedures should be used in succession.

- "Volunteer Registration Page" on page 223
- "Volunteer Page Style" on page 226
- "General Volunteer Page Options" on page 227
- "Volunteer Assignment Interests" on page 230
- "Volunteer Profiling" on page 232
- "Additional Links" on page 233
- "Update the Volunteer Sign-up Page" on page 234

On the Volunteer Registration Page screen, you can enter a header to appear on your online registration page and preview the page.

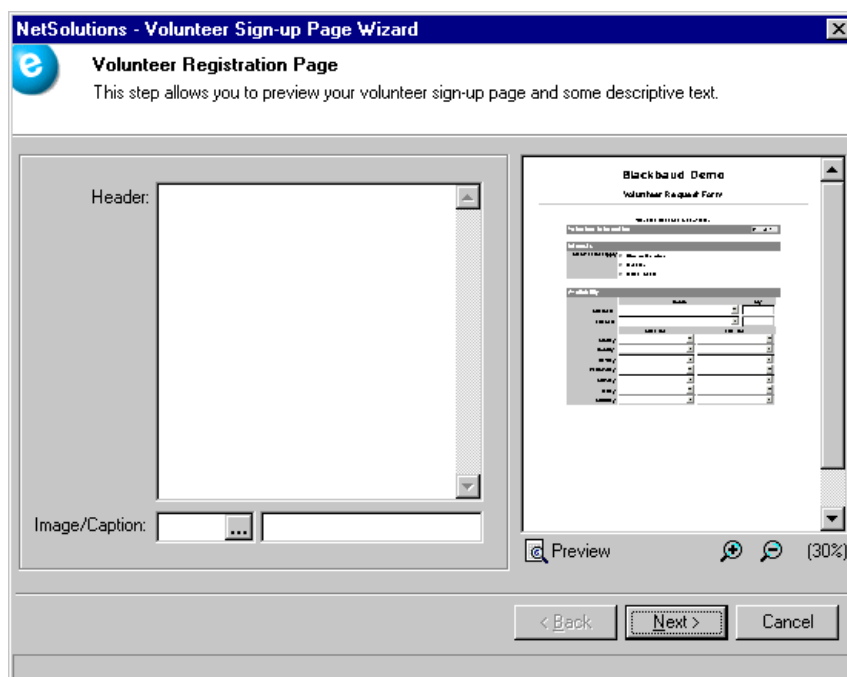
► Completing the Volunteer registration page screen

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

2. Click **NetVolunteers**. The NetSolutions - NetVolunteer screen appears.

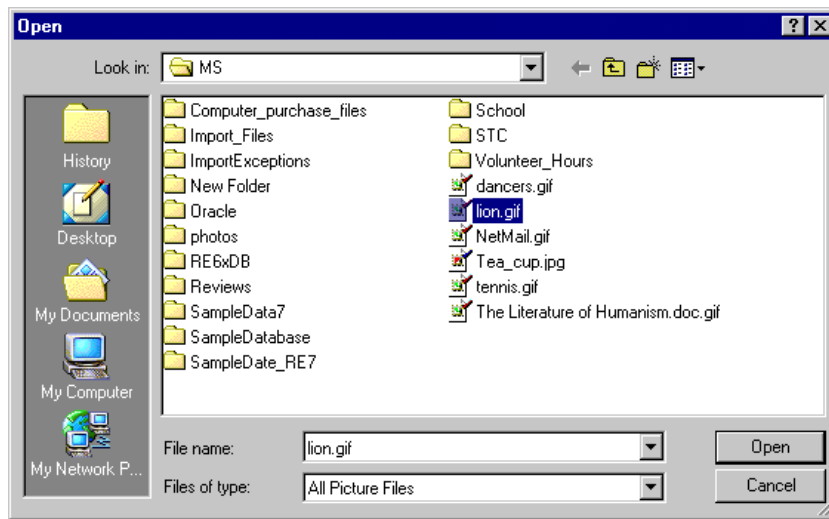


3. Click **Volunteer Sign-up Page**. The Volunteer Sign-up Page Wizard screen appears, displaying the Volunteer Registration Page screen.

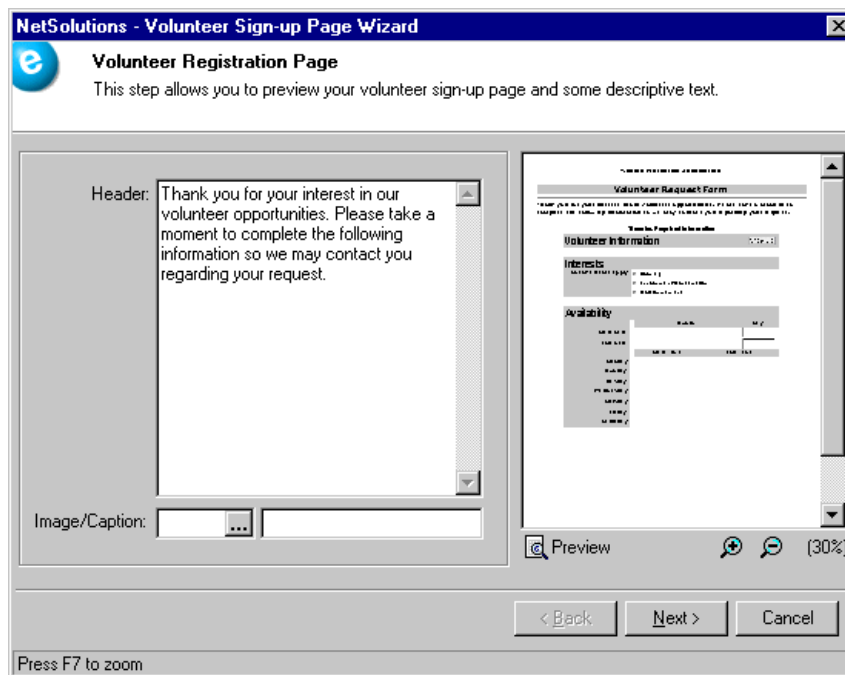


4. In the **Header** box (1,024 character limit), enter any information you want to appear at the top of your online registration page.

- To include an image on your volunteer page, in the **Image/Caption** fields, click the ellipsis to access the Open screen.



- Locate the image to include and click **Open**. You return to the Donation Page Wizard screen.
- In the second **Image/Caption** field, enter the caption to appear under the image.



- To preview your online registration page, click **Preview**.

This is what your online volunteer registrant sees.

Volunteer Request Form

Thank you for your interest in our volunteer opportunities. Please take a moment to complete the following information so we may contact you regarding your request.

*Denotes Required Information

Volunteer Information [Show Bio](#)

Date of Birth

Interests

Check all that apply ☐ Cooking ☐ Environment/Conservation ☐ Golf tournament

Availability

	Month	Day
Start Date		
End Date		
	Start Time	End Time
Sunday		
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday		

- Click **Next** to move to the Volunteer Page Style screen, or click **Close** to return to the NetVolunteer screen.

Volunteer Page Style

This is the second step in a series of procedures explaining the Volunteer Sign-up Page Wizard. The following procedures should be used in succession.

- “Volunteer Registration Page” on page 223
- “Volunteer Page Style” on page 226
- “General Volunteer Page Options” on page 227
- “Volunteer Assignment Interests” on page 230
- “Volunteer Profiling” on page 232
- “Additional Links” on page 233
- “Additional Links” on page 233
- “Update the Volunteer Sign-up Page” on page 234

Using the Page Style screen, you can give a donation page a unique look, setting it apart from your other *NetSolutions* pages. The style you established in **Configure and Customize** defaults to all your *NetSolutions* Web pages, but you can change the style for each donation page using the Page Style screen. The fields and checkboxes available on this screen change based on the **Page section** you select. You can change the background, logo and title, image, header, detail, body, table legend, table headers, table text, and error text styles.

For detailed instructions about each option, see “Changing Page Style” on page 387.

If you are happy with the page style you established in **Configure and Customize**, do not make any changes on this screen, and click **Next** to move to the General Volunteer Page Options screen.

General Volunteer Page Options

This is the third step in a series of procedures, explaining the Volunteer Sign-up Page Wizard. The following procedures should be used in succession.

- “Volunteer Registration Page” on page 223
- “Volunteer Page Style” on page 226
- “General Volunteer Page Options” on page 227
- “Volunteer Assignment Interests” on page 230
- “Volunteer Profiling” on page 232
- “Additional Links” on page 233
- “Additional Links” on page 233
- “Update the Volunteer Sign-up Page” on page 234

On the General volunteer page options screen, you can enter the constituent code assigned to new constituent records, customize your thank-you response, and select the volunteer options to use when volunteer information is imported from your Web page into *The Raiser’s Edge*.

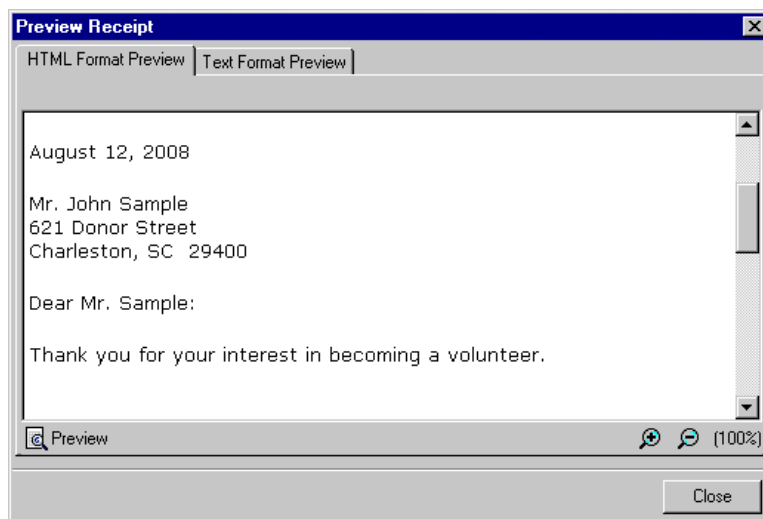
► Completing the General volunteer page options screen

1. After you complete the Page Style screen, click **Next**. The General volunteer page options screen appears.

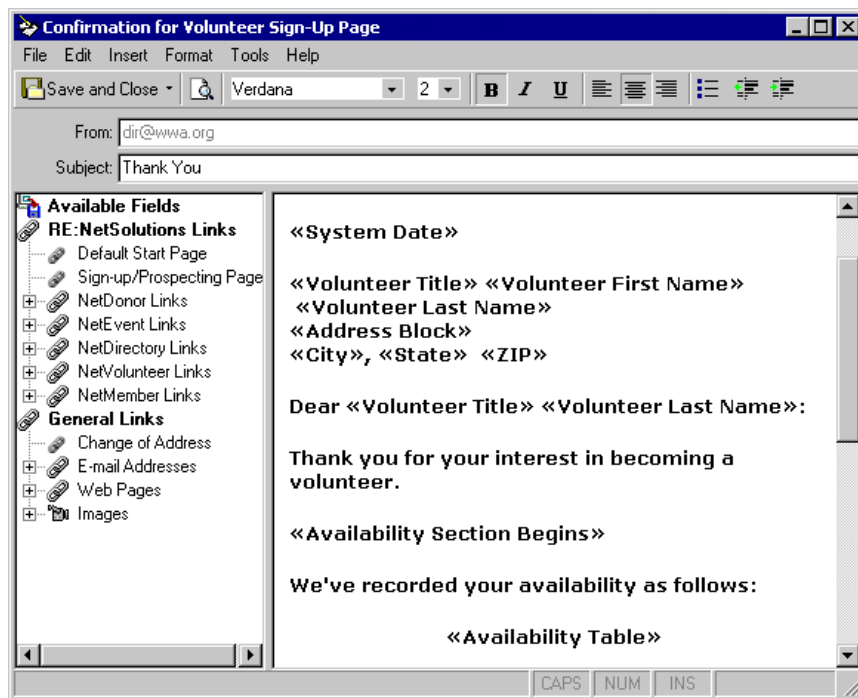
The screenshot shows a web browser window titled "NetSolutions - Volunteer Sign-up Page Wizard". The main heading is "General volunteer page options". Below the heading is a sub-heading: "Select a constituent code and volunteer information for your new volunteers, and design your thank you note." The form contains several sections: "Constituent Code" with a dropdown menu set to "Volunteer"; "Thank You" with a text area for a confirmation message and buttons for "Preview Confirmation..." and "Customize Layout..."; "Email:" with a text field containing "dir@wwwa.org"; "Volunteer Options" with dropdowns for "Volunteer type:" (set to "General") and "Volunteer status:" (set to "Active"); and three checked checkboxes: "Collect interest information", "Collect availability information", and "Allow volunteers to enter comments". At the bottom are buttons for "< Back", "Next >", and "Cancel".

2. In the **Enter the code to use when creating a new constituent record for a volunteer** field, select the constituent code to assign online volunteer registrants who are not already constituents in your database. For example, if you select “Volunteer”, when you commit the online information to *The Raiser’s Edge*, “Volunteer” appears in the **Constituent Codes** grid of the Bio 2 tab on the constituent record.

3. **NetVolunteers** includes a default thank-you response automatically emailed to your online volunteer registrants. To view the default response, click **Preview Confirmation**. The Preview Confirmation screen appears.



4. To create your own thank-you response, click **Customize Layout**. The Receipt for Volunteer Sign-up Page screen appears.



For detailed instructions about creating a receipt, see "Customizing Confirmations" on page 367.

Warning: On the job record you can use the **Tools, Find Volunteers** menu option to automatically find jobs and assign them to a volunteer. To use this function effectively, we recommend you enter a volunteer **Type** on the Volunteer tab of the constituent record only if a type is required by your organization. If a volunteer can be one of several types to perform a job, you can actually eliminate jobs when using this option, because the information in this column becomes required criteria.

- On the General volunteer page options screen, in the **Email:** field, enter an email address to include in the **From:** field of your email thank-you message. The email information you entered in **Configuration and Customize** defaults, but you can edit the address on this screen.
- In the **Volunteer Options** frame, select a **Volunteer type** and **Volunteer status** to assign any online volunteer records.

For example, in the **Volunteer type** field select “General” and in the **Volunteer status** field select “Active”. When you commit information entered online to *The Raiser’s Edge*, the **Volunteer type** and **Volunteer status** appear in the **Volunteer Types** grid accessed through the **General** tree view category on the Volunteer tab of the constituent record.

- In the **Volunteer Options** frame, to include a list of assignment interests from which online volunteer registrants can choose, mark the **Collect interest information** checkbox. An **Interests** frame is added to your online registration form.

This is what your online volunteer registrant sees. The interests included depend on your selections on the Volunteer Assignment Interests screen.

Interests	
Check all that apply	☐ Cooking ☐ Environment/Conservation ☐ Golf tournament

- To include availability information, on the Volunteer Sign-up Page Wizard screen, mark the **Collect availability information** checkbox. An **Availability** frame is added to your online registration form. If you mark this checkbox, and an online volunteer enters availability information, this information overwrites any existing availability information on the Volunteer tab of the volunteer’s constituent record.

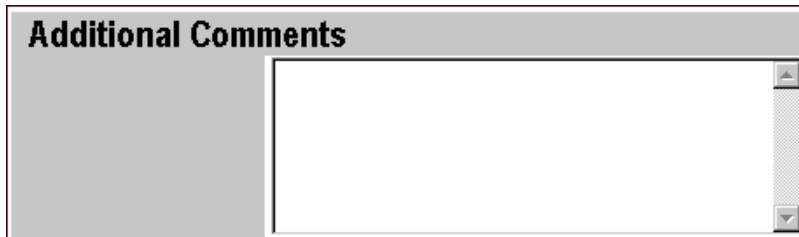
This is what your online volunteer registrant sees.

Availability		
	Month	Day
Start Date		
End Date		
	Start Time	End Time
Sunday		
Monday		
Tuesday		
Wednesday		
Thursday		
Friday		
Saturday		

Note: For more information about the Volunteer tab, see the *Volunteers & Jobs Data Entry Guide*.

- To accept comments from your online volunteer registrants, on the Volunteer Sign-up Page Wizard screen, mark the **Allow volunteers to enter comments** checkbox. An **Additional Comments** frame is added to your online registration form.

This is what your online volunteer registrant sees.

The image shows a web form titled "Additional Comments". It consists of a header bar with the title in bold black text. Below the header is a large, empty rectangular text area with a thin border. To the right of the text area is a vertical scrollbar. The entire form is set against a light gray background.

10. From the Volunteer Sign-up Page Wizard screen, click **Next**. If you marked **Collect Interest Information**, the Volunteer Assignment Interests screen appears. Otherwise, the Volunteer Profiling screen appears. Click **Close** to exit the Volunteer Sign-up Page Wizard and return to the NetVolunteer screen. For information about the Volunteer Assignment Interest screen, see Volunteer Assignment Interests; for information about the Volunteer Registration screen, see “Volunteer Profiling” on page 232.

Volunteer Assignment Interests

If you marked **Collect Interest Information** on the General volunteer page options screen, this is the fourth procedure in a series of procedures explaining the Volunteer Sign-up Page Wizard. If you did not mark this checkbox, skip to “Volunteer Profiling” on page 232. The following procedures should be used in succession.

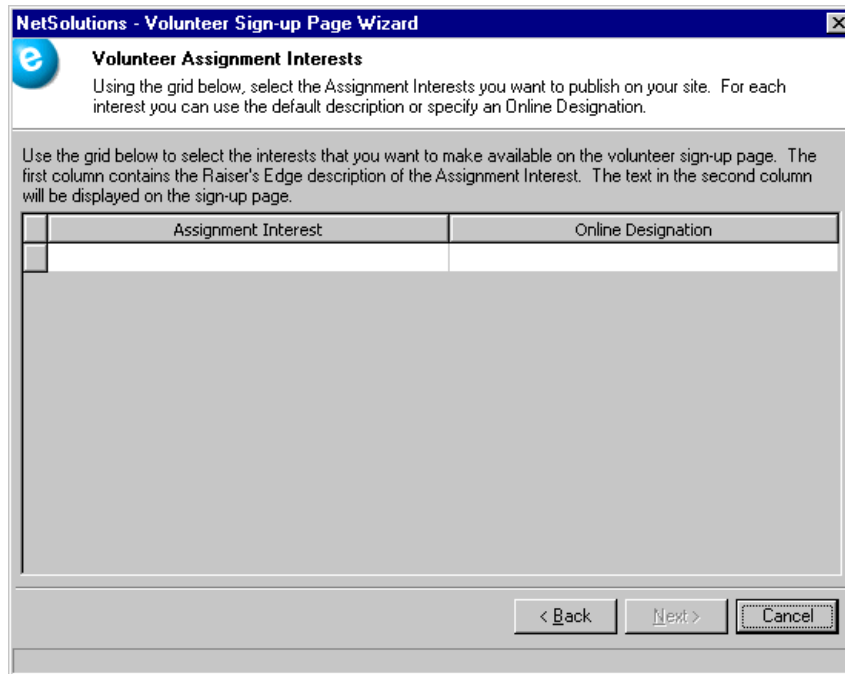
- “Volunteer Registration Page” on page 223
- “Volunteer Page Style” on page 226
- “General Volunteer Page Options” on page 227
- “Volunteer Assignment Interests” on page 230
- “Volunteer Profiling” on page 232
- “Additional Links” on page 233
- “Additional Links” on page 233
- “Update the Volunteer Sign-up Page” on page 234

Note: You create volunteer interests in the **Assignment Interests** table in the Tables section of *Configuration*. For more information, see the Configuration chapter in the *Configuration & Security Guide*.

On the Volunteer Assignment Interests screen, you can select the assignment interests to publish on your Web site, and you can also enter a description for each interest.

► **Completing the Volunteer assignment interest screen**

1. After you complete the General volunteer page options screen, click **Next**. If you marked **Collect interest information** checkbox, the Volunteer Assignment Interests screen appears.



NetSolutions - Volunteer Sign-up Page Wizard

Volunteer Assignment Interests

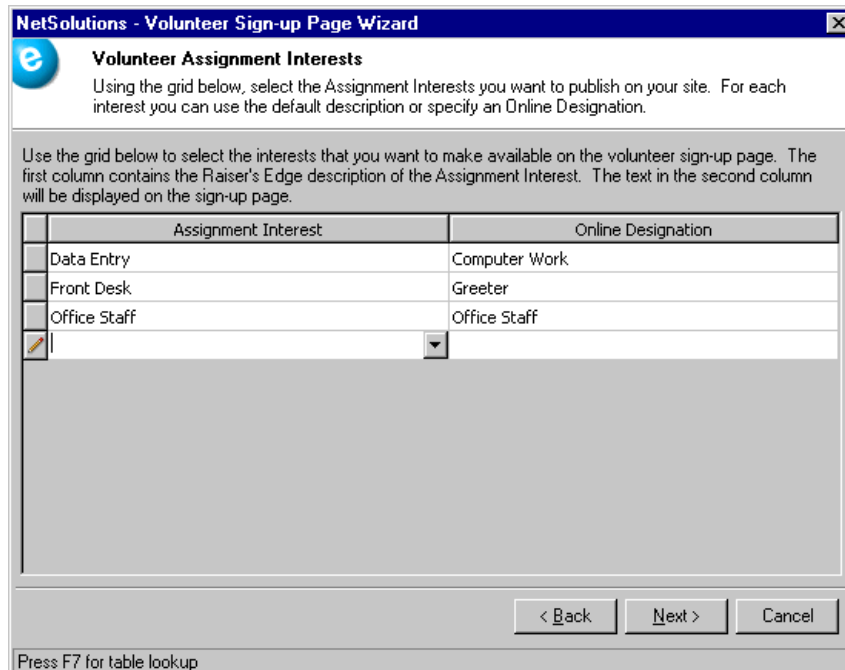
Using the grid below, select the Assignment Interests you want to publish on your site. For each interest you can use the default description or specify an Online Designation.

Use the grid below to select the interests that you want to make available on the volunteer sign-up page. The first column contains the Raiser's Edge description of the Assignment Interest. The text in the second column will be displayed on the sign-up page.

	Assignment Interest	Online Designation
☐		

< Back Next > Cancel

2. Click in the **Assignment Interest** column and select the assignment interests published on your volunteer registration page. To change the assignment interest name for online publication, enter the new name in the **Online Designation** column.



NetSolutions - Volunteer Sign-up Page Wizard

Volunteer Assignment Interests

Using the grid below, select the Assignment Interests you want to publish on your site. For each interest you can use the default description or specify an Online Designation.

Use the grid below to select the interests that you want to make available on the volunteer sign-up page. The first column contains the Raiser's Edge description of the Assignment Interest. The text in the second column will be displayed on the sign-up page.

	Assignment Interest	Online Designation
☐	Data Entry	Computer Work
☐	Front Desk	Greeter
☐	Office Staff	Office Staff
☐		

< Back Next > Cancel

Press F7 for table lookup

3. Click **Next** to move to the Volunteer Profiling screen, or click **Close** to return to the NetVolunteer screen.

- “Volunteer Registration Page” on page 223
- “Volunteer Page Style” on page 226
- “General Volunteer Page Options” on page 227
- “Volunteer Assignment Interests” on page 230
- “Job Profiling” on page 245
- “Additional Links” on page 233
- “Update the Volunteer Sign-up Page” on page 234

► **Adding volunteer profiling information for your volunteer sign-up page**

-
- NetSolutions - Volunteer Sign-up Page Wizard**
- Volunteer Profiling**
- Use Volunteer Profiling questions to gather additional information from your Web users that will help segment, target, and cultivate your constituency.
- | Profiling Question | Attribute to Use |
|--------------------------------|------------------|
| Did you receive our jobs list? | Mailing |
- < Back Next > Cancel

On this screen, enter questions to appear on your job sign-up page. The questions help you better understand your volunteers.

- For example, in the **Donor Profiling Question** column, you can ask the question, “Did you receive our 2008 jobs list?”. This question then appears at the end of the job sign-up page. The question is limited to 120 characters.

Please complete the following information. When you are finished, click Continue to enter your request.

*** Denotes Required Information**

Registration Information	
Title	
First Name	
Last Name*	
Address*	
City, State ZIP*	,
Country*	United States
Phone	
Fax	
Email*	
☒ I wish to receive future email correspondence.	

Additional Information	
	☐ Did you receive our jobs list?

Continue >

Note: Only yes/no constituent attributes appear in the **Attribute to Use** column.

- In the **Attribute to Use** column, you must assign the question to a constituent attribute in your database. In the example above, if the registrant marks **Did you receive our 2008 jobs list?** on the job sign-up page, the information appears on the Attributes tab of the constituent record.

On the constituent record, “Mailing” appears in the **Category** column and “Yes” appears in the **Description** column.

- From the Volunteer Sign-up Page Wizard screen, click **Next** and move to the Additional Links screen.

Additional Links

If you marked **Collect Interest Information** on the General volunteer page options screen, this is the sixth procedure in a series of procedures explaining the Volunteer Sign-up Page Wizard. If you did not mark this option, this is your fourth procedure. The following procedures should be used in succession.

- “Volunteer Registration Page” on page 223
- “Volunteer Page Style” on page 226
- “General Volunteer Page Options” on page 227
- “Volunteer Assignment Interests” on page 230
- “Volunteer Profiling” on page 232

- “Additional Links” on page 233
- “Update the Volunteer Sign-up Page” on page 234

From the Additional Links screen, you can add links to related Web pages. For example, add a link to a detailed explanation of your privacy policy.

► **Adding links to your online volunteer sign-up page**

1. Once you complete the Volunteer Profiling screen, click **Next**. The Additional Links screen appears.

NetSolutions - Volunteer Sign-up Page Wizard

Additional Links
Add links to your volunteer signup page to point your volunteers to privacy or other information they need to know.

Image	Caption	URL
<image>	Privacy Policy	http://privacy_is_important

< Back Next > Cancel

2. In the **Image** column, you must map to an image to use as the hyperlink on your sign-up page.
3. In the **Caption** column, enter the text visitors see when they hover their mouse over the hyperlink image.
4. In the **URL** column, enter the address of the Web page to which you are adding a link. The column accepts the URL with or without the <http://>.
5. The **Path** column displays the location of the **Image** you selected.
6. From the Volunteer Sign-up Page Wizard screen, click **Next** and move to the Update the Volunteer Sign-up Page screen.

Update the Volunteer Sign-up Page

This is the final step in a series of procedures explaining the Volunteer Sign-up Page Wizard. The following procedures should be used in succession.

- “Volunteer Registration Page” on page 223
- “Volunteer Page Style” on page 226
- “General Volunteer Page Options” on page 227
- “Volunteer Assignment Interests” on page 230
- “Volunteer Profiling” on page 232
- “Additional Links” on page 233
- “Update the Volunteer Sign-up Page” on page 234

On the Update the Volunteer Sign-up Page screen, you can review all the information you entered in the Volunteer Sign-up Page Wizard.

► **Completing the Update the volunteer sign-up page screen**

1. After you complete the Additional Links screen, click **Next**. The Update the Volunteer Sign-up Page screen appears.

NetSolutions - Volunteer Sign-up Page Wizard

Update the Volunteer Sign-up Page
This step allows you to review what you have entered before updating the Volunteer Sign-up page.

=====Volunteer Sign-up Summary=====

Name: Volunteer Sign-up Page

Header: Thank you for your interest in our volunteer opportunities. Please take a moment

Collect availability information: Yes
Collect interest information: Yes
Interests: Cooking, Cooking
Environment/Conservation, Environment/Conservation
Golf tournament, Golf tournament

Sender e-mail: bsmith@wpa.org

Constituent code: Volunteer

Volunteer type: General
Volunteer status: Active
Allow comments: Yes

< Back Finish Cancel

2. Click **Finish**. The volunteer registration page information is submitted to Blackbaud and the Congratulations screen appears.

NetSolutions - Volunteer Sign-up Page Wizard

Congratulations!
This Volunteer Sign-up page has been successfully updated.

This volunteer sign-up page has been updated. The link below will launch your browser so you can see how your volunteer sign-up Web page looks.

[Click here to visit the volunteer sign-up page](#)

To add a link to this NetSolutions page on your Web page, copy the HTML code below and paste it into the appropriate page on your site.

```
<!-- Code Supplied by Blackbaud Begins -->
<A
  HREF="http://VM-PTLR61-NS781/OPXDONATE/JobRegister.asp?cguid=6DF2B01A%2D56
  31%2D4436%2DBF1D%2D677C76A0949C">Click here to visit the Volunteer Sign-up
  page</A>
<!-- Code Supplied by Blackbaud Ends -->
```

< Back Finish Close

3. Click the **Click here to visit the volunteer sign-up page** to preview your new online Volunteer Request Form.
4. To add the Volunteer Registration Form to your existing Web site, cut and paste the code provided in the box beneath the **Click here to visit the volunteer sign-up page** link.
5. To return to the NetSolutions - Net Volunteers screen, click **Close**.

Publishing a Job to Your Web Site

With **NetVolunteers**, you can take job information from ***The Raiser's Edge*** and make it available on your Web site. The jobs Web page is hosted by Blackbaud but formatted based on your selections in **Configure and Customize** and **NetVolunteers**.

Publish a Job to the Web

This is the first step in a series of procedures explaining the Web Job Wizard. The following procedures should be used in succession.

- "Publish a Job to the Web" on page 236
- "Job Page" on page 239
- "Job Page Style" on page 240
- "Miscellaneous" on page 241
- "Qualifications" on page 243
- "Job Profiling" on page 245
- "Additional Links" on page 247
- "Publish the Job" on page 248

On the Publish a Job to the Web screen, you select the job record in ***The Raiser's Edge*** to publish on your Web site.

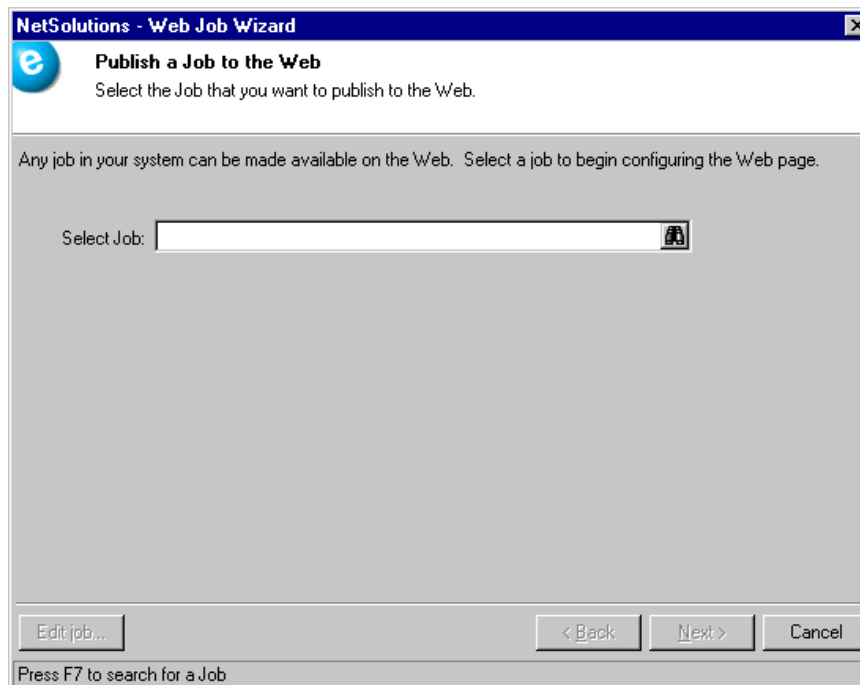
► **Completing the Publish a job to the web screen**

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

2. Click **NetVolunteers**. The NetSolutions - NetVolunteer screen appears.



3. To create a new online job page, click the **New Job** button. The Web Job Wizard screen appears.



4. In the **Select Job** field, you must select the job from *The Raiser's Edge* to make available online. Click the binoculars. The Open screen appears.

5. In the **Find Jobs that meet these criteria** frame, enter criteria, narrowing the job search, and click **Find Now**. All job records satisfying the criteria appear in the grid. Or, leave all criteria fields blank and click **Find Now** to view all job records available in the database.
If the job does not exist, click **Add New**. The New Job screen appears, and you can create the job to post on your Web site.
6. Once you select a job, click **Open**.

Note: For information about adding a job record to your database, see the *Volunteers & Jobs Data Entry Guide*.

The selected job appears in the **Select Job** field on the NetSolutions - Web Job Wizard screen.

7. If at any point you need to change information entered on the selected job record, click **Edit Job** in the bottom left corner of the screen. The job record appears displaying the General tab.

You can make the necessary changes to the job record and click **Save and Close** to return to the Web Job Wizard.

8. Click **Next** to move to the Job Page screen, or click **Close** to return to the NetVolunteer screen.

Job Page

This is the second step in a series of procedures explaining the Web Job Wizard. The following procedures should be used in succession.

- “Publish a Job to the Web” on page 236
- “Job Page” on page 239
- “Job Page Style” on page 240
- “Miscellaneous” on page 241
- “Qualifications” on page 243
- “Job Profiling” on page 245
- “Additional Links” on page 247
- “Publish the Job” on page 248

On the Job Page screen, you enter information describing your online job. You can enter a job name, the hours required, a description, and details about the job. You can also include an image and a caption.

► Completing the Job page screen

1. After you complete the Publish a Job to the Web screen, click **Next**. The Job Page appears.

2. The **Job Name** field defaults to the job entered in the **Select Job** field on the Publish a Job on the Web screen. If you entered a job description on the General tab of the Job record it defaults in the **Description** field. There is a 1,024 character limit.

3. In the **Time** field, enter the specific time and days a volunteer for this position will work.
4. In the **Commitment** field, enter the total number of hours the volunteer must commit to this job.
5. In the **Detail comment** box, enter any additional information potential volunteers should know about this job.
6. In the first **Image/Caption** field, select an image to include on your job Web page. Click the ellipsis to access the Open screen.
Select the image file to include on the online job page, and click **Open** to return to Web Job Wizard screen.
7. In the second **Image/Caption** field, enter a caption to appear under the image.
8. Keep the **Display Tell a Friend link** checkbox marked if the **Tell a Friend** link you designed in **Configure and Customize** should appear on your page.

Note: For more information about adding your logo to the job Web page, see “Configuring Your Web Pages” on page 23.

9. To preview the information you added on this screen on your online job page, click **Preview**.
10. To close the preview page and return to the Web Job Wizard screen, click the “X” in the upper right corner.
11. From the Job Page screen, click **Next** to move to the Job Page Style screen, or click **Close** to return to the NetVolunteer screen.

Job Page Style

This is the third step in a series of procedures explaining the Web Job Wizard. The following procedures should be used in succession.

- “Publish a Job to the Web” on page 236
- “Job Page” on page 239
- “Job Page Style” on page 240

- “Miscellaneous” on page 241
- “Qualifications” on page 243
- “Job Profiling” on page 245
- “Additional Links” on page 247
- “Publish the Job” on page 248

Using the Page Style screen, you can give your Web page a unique look, setting it apart from your other *NetSolutions* pages. The style you established in **Configure and Customize** defaults to all of your *NetSolutions* Web pages, but you can change the style for each page using the Page Style screen. The fields and checkboxes available on this screen change based on the **Page section** you select. You can change the background, logo and title, image, header, detail, body, table legend, table headers, table text, and error text styles.

For detailed instructions about each option, see “Changing Page Style” on page 387.

If you are happy with the page style you established in **Configure and Customize**, do not make any changes on this screen, and click **Next** to move to the Miscellaneous screen.

Miscellaneous

This is the fourth step in a series of procedures explaining the Web Job Wizard. The following procedures should be used in succession.

- “Publish a Job to the Web” on page 236
- “Job Page” on page 239
- “Job Page Style” on page 240
- “Miscellaneous” on page 241
- “Qualifications” on page 243
- “Job Profiling” on page 245
- “Additional Links” on page 247
- “Publish the Job” on page 248

On the Miscellaneous screen you select the constituent code to use when creating a new constituent record for a volunteer, customize your thank-you message, and select volunteer options to include on the Web site.

► **Completing the Miscellaneous screen**

1. After you complete the Page Style screen, click **Next**. The Miscellaneous screen appears.

NetSolutions - Web Job Wizard

Miscellaneous
Enter the default constituent code for new volunteers, and customize the thank you letter layout.

Constituent Code _____
Enter the code to use when creating a new constituent record for a volunteer:

Thank You _____
A confirmation message will be displayed and emailed to those who successfully complete this process. You can preview that message, or customize it, using the buttons below. You may also personalize the message by changing the sender email address.

Email:

Volunteer Options _____
☒ Allow volunteers to enter comments

2. In the **Enter the code to use when creating a new constituent record for a volunteer** field, select the constituent code to assign online job volunteers who are not already constituents in your database. For example, if you select “Volunteer”, when you commit the online information to **The Raiser’s Edge**, “Volunteer” appears in the **Constituent Codes** grid of the Bio 2 tab on the new constituent record.
3. **NetVolunteers** includes a default thank-you response, automatically emailed to your online volunteers. To view the default response, click **Preview Confirmation**. The Preview Confirmation screen appears.

Preview Receipt

HTML Format Preview | Text Format Preview

Mr. John Sample
621 Donor Street
Charleston, SC 29400

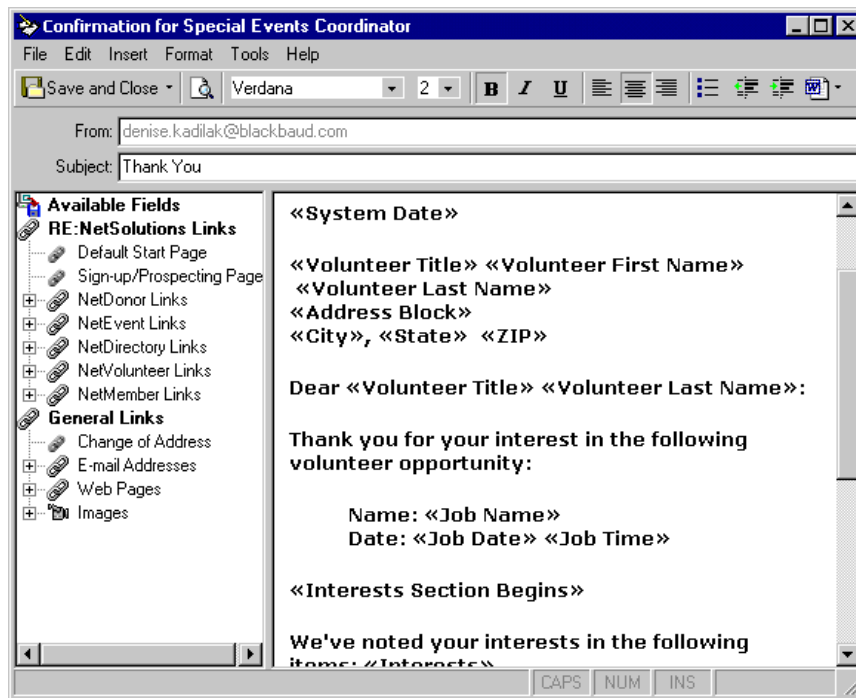
Dear Mr. Sample:

Thank you for your interest in the following volunteer opportunity:

Name: Special Events Coordinator
Date: January 1, 2008

(100%)

4. To create your own thank-you response, click **Customize Layout**. The Confirmation screen appears.



For detailed instructions about creating a receipt, see “Customizing Confirmations” on page 367.

5. On the Miscellaneous screen, in the **Email:** field, enter an email address to include in the **From:** field of your email thank-you message. The email information you entered in **Configuration and Customize** defaults, but you can edit the address on this screen.
6. To encourage online volunteers to enter comments, mark the **Allow volunteers to enter comments** checkbox. A **Comments** box is included on the online registration page.

This is what your online volunteer sees.

7. From the Miscellaneous screen, click **Next** to move to the Qualifications screen, or click **Close** to return to the NetVolunteer screen.

Qualifications

This is the fifth step in a series of procedures explaining the Web Job Wizard. The following procedures should be used in succession.

- “Publish a Job to the Web” on page 236
- “Job Page” on page 239
- “Job Page Style” on page 240
- “Miscellaneous” on page 241

- “Qualifications” on page 243
- “Job Profiling” on page 245
- “Additional Links” on page 247
- “Publish the Job” on page 248

On the Qualifications screen, you select the skills, experience, courses and training the volunteer position requires. You can add qualifications from the job record. If you need to add qualifications to the job record, open the record by clicking the **Edit job** button at the bottom of the screen.

► **Completing the Qualifications screen**

1. After you complete the Miscellaneous screen, click **Next**. The Qualifications screen appears.

NetSolutions - Web Job Wizard

Qualifications

Using the grids below, select the skills and course information that you want to include on the job page. Text entered in Additional Qualifications will be displayed in the details section of the job

Skills and Experience

Include	Description	Skill Level	License Type
☒	Typing/Word Processing	Average	

Courses and Training

Include	Course Name	Certification
☒	Job Skills Assessment	College or Technical School

Additional Qualifications

Warning: Entering **Skills and Experience** and **Courses and Training** may severely limit your search criteria if you use the **Tools, Find Volunteers** menu option on the Volunteer tab of a constituent record.

2. In the **Skills and Experience** frame, **Description**, **Skill Level**, and License **Type** information entered on the Details tab of the job record appear. To include this information on your Web page, mark the checkbox in the **Include** column.

To add or change **Skills and Experience** or **Courses and Training** information, click **Edit Job**. The job record appears. Select the Details tab and make any necessary changes.

Note: For more information about job records, see the *Volunteers & Jobs Data Entry Guide*.

Click **Save and Close** to save the changes and return to the Web Job Wizard screen.

3. In the **Courses and Training** frame, **Course Name** and **Certification** information entered on the Details tab of the job record appear. To include this information on your Web page, mark the checkbox in the **Include** column.

4. In the **Additional Qualifications** frame, enter any additional qualification information to appear on your Web page that is not included on the job record.

NetSolutions - Web Job Wizard

Qualifications
Using the grids below, select the skills and course information that you want to include on the job page. Text entered in Additional Qualifications will be displayed in the details section of the job

Skills and Experience

Include	Description	Skill Level	License Type
☒	Typing/Word Processing	Average	

Courses and Training

Include	Course Name	Certification
☒	Job Skills Assessment	College or Technical School

Additional Qualifications
Well organized and detail-oriented

Edit job... < Back Next > Close

Press F7 to zoom

This is what your online volunteer sees.

Julianne's Organization

Special Events Coordinator

Tell a friend

Date: Friday January 1 through Wednesday September 1, 2008

Skills and Experience

Description	Skill Level	License
Typing/Word Processing	Average	

Courses and Training

Course Name	Certification
Job Skills Assessment	College or Technical School

Minimum Age: 21

Additional Qualifications: Well organized and detail-oriented

Person will be responsible for coordinating all aspects of the event including:
find location, contact vendors, negotiate pricing and expenses, award prizes.

[Click here to express interest in this opportunity](#)

5. From the Qualifications screen, click **Next** to move to the Job Profiling screen, or click **Close** to return to the NetVolunteer screen.

Job Profiling

This is the sixth step in a series of procedures explaining the Web Job Wizard. The following procedures should be used in succession.

- "Publish a Job to the Web" on page 236
- "Job Page" on page 239

- “Job Page Style” on page 240
- “Miscellaneous” on page 241
- “Qualifications” on page 243
- “Job Profiling” on page 245
- “Additional Links” on page 247
- “Publish the Job” on page 248

Job profiling allows you to include questions on your job page to gather additional information from potential volunteers. These questions help you segment, target, and cultivate your constituency. On the Job Profiling screen, you can enter profiling question specific to this job page. The default profiling information, used for all **NetSolutions** functions, is entered in **Configure and Customize**.

► **Adding job profiling information for your job page**

1. Once you complete the Qualifications screen, click **Next**. The Job Profiling screen appears.

Profiling Question	Attribute to Use
What are your normal business hours?	Business Hours

- For example, in the **Donor Profiling Question** column, you can ask the question “What are your normal business hours?”. This question then appears at the end of the job page. The question is limited to 120 characters.

Please complete the following information. When you are finished, click Continue to enter your request.

*** Denotes Required Information**

Registration Information	
Title	
First Name	
Last Name*	
Address*	
City, State ZIP*	,
Country*	United States
Phone	
Fax	
E-mail*	
☒ I wish to receive future e-mail correspondence.	

Additional Information	
What are your normal business hours?	

Continue >

- In the **Attribute to Use** column, you must assign the question to an constituent attribute in your database. The information appears on the Attributes tab of the constituent record when you download the data from your Web pages.
- From the Web Job Wizard screen, click **Next** and move to the Additional Links screen.

Additional Links

This is the seventh step in a series of procedures explaining the Web Job Wizard. The following procedures should be used in succession.

- “Publish a Job to the Web” on page 236
- “Job Page” on page 239
- “Job Page Style” on page 240
- “Miscellaneous” on page 241
- “Qualifications” on page 243
- “Job Profiling” on page 245
- “Additional Links” on page 247
- “Additional Links” on page 247
- “Publish the Job” on page 248

From the Additional Links screen, you can add links to related Web pages. For example, you can add a link to a detailed explanation of your privacy policy.

► **Adding links to your online jobs page**

1. Once you complete the Job Profiling screen, click **Next**. The Additional Links screen appears.

Image	Caption	URL
<image>	Privacy Policy	http://privacy_matters

2. In the **Image** column, you must map to an image to use as the hyperlink on your jobs page.
3. In the **Caption** column, enter the text visitors see when they hover their mouse over the hyperlink image.
4. In the **URL** column, enter the address of the Web page to which you are adding a link. The column accepts the URL with or without the <http://.
5. The **Path** column displays the location of the **Image** you selected.
6. From the Web Job Wizard screen, click **Next** and move to the Publish the Job screen.

Publish the Job

This is the final step in a series of procedures explaining the Web Job Wizard. The following procedures should be used in succession.

- “Publish a Job to the Web” on page 236
- “Job Page” on page 239
- “Job Page Style” on page 240
- “Miscellaneous” on page 241
- “Qualifications” on page 243
- “Job Profiling” on page 245
- “Additional Links” on page 247
- “Publish the Job” on page 248

The Publish the Job screen summarizes the selections you made on the Web Job Wizard.

► **Completing the Publish the job screen**

1. After you complete the Additional Links screen, click **Next**. The Publish the Job screen appears.

NetSolutions - Web Job Wizard

Publish the Job
This step allows you to review what you have entered before publishing the Job to the Web.

====Publish Job Summary====
Job Name: Special Events Coordinator
Name: Special Events Coordinator
Image: Yes
Caption: Help up us kick off our ball!

Details:

Date:	Friday January 1 through Wednesday September 1, 2008
Time:	9 a.m. to 2 p.m.
Commitment:	25 hours a week
Skills and Experience:	Typing/Word Processing, Average
Courses and Training:	None
Minimum Age:	21
Additional Qualifications:	Well organized and detail-oriented.

Detail Comment: Please do not volunteer unless you can work the specific hours needed.

< Back Finish Close

2. Click **Finish**. A screen appears displaying a link to your new job Web page.

NetSolutions - Web Job Wizard

Congratulations!
This job has been successfully published to the Web.

This job has now been published to the Web. The link below will launch your browser so you can see how your job Web page looks.

[Click here to visit the job page](#)

To add a link to this NetSolutions page on your Web page, copy the HTML code below and paste it into the appropriate page on your site.

```
<!-- Code Supplied by Blackbaud Begins -->
<A
HREF="http://M-PTLR61-NS781/DPXREPHIL/JobDetail.asp?cguid=6DF2B01A%2D5631%
2D4436%2DBF1D%2D677C76A0949C&jid=32">Click here to visit the Special Events
Coordinator page</A>
<!-- Code Supplied by Blackbaud Ends -->
```

< Back Finish Close

3. Click the **Click here to visit the job page** link. The Web page you just designed appears.
4. To add the Web Job Form to your existing Web site, cut and paste the code provided in the box beneath the **Click here to visit the directory page** link.
5. To close the preview page and return to the Web Job Wizard screen, click the "X" in the upper right corner.

6. To exit the Web Job Wizard screen, click **Close**. You return to the NetSolutions - NetVolunteer screen. The new online job appears as a link on the screen.



7. To add the jobs page you just designed to your Web site, open **Configure and Customize** and select the Site Map/Links tab. Click the link under **Volunteer Opportunities**. The code necessary to add the page to their Web site appears. Paste this code to your Web site.
8. To exit the NetSolutions - NetVolunteer screen and return to the NetSolutions page, click the "X" in the upper right corner.

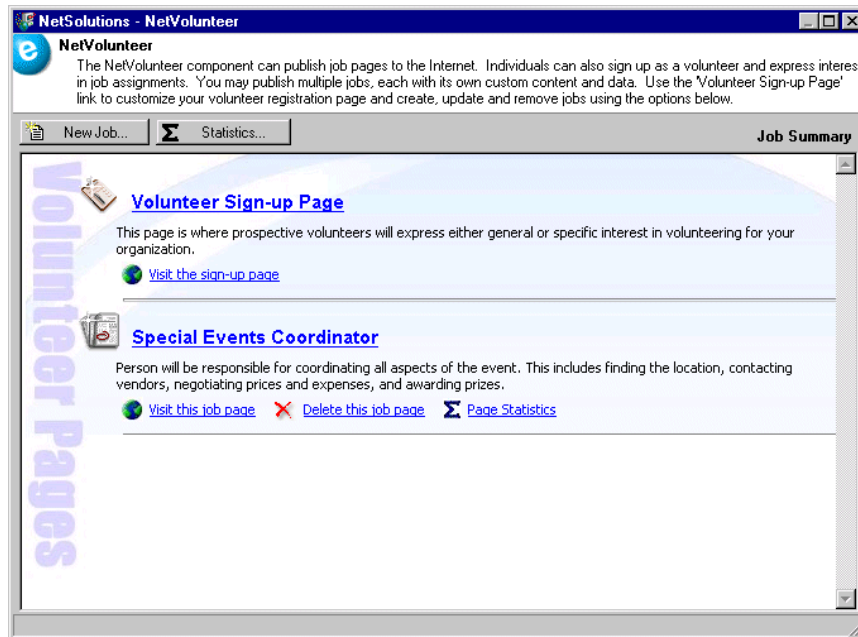
Viewing a Job Web Page

After you create an online job page, you can access and edit the page through *NetSolutions*.

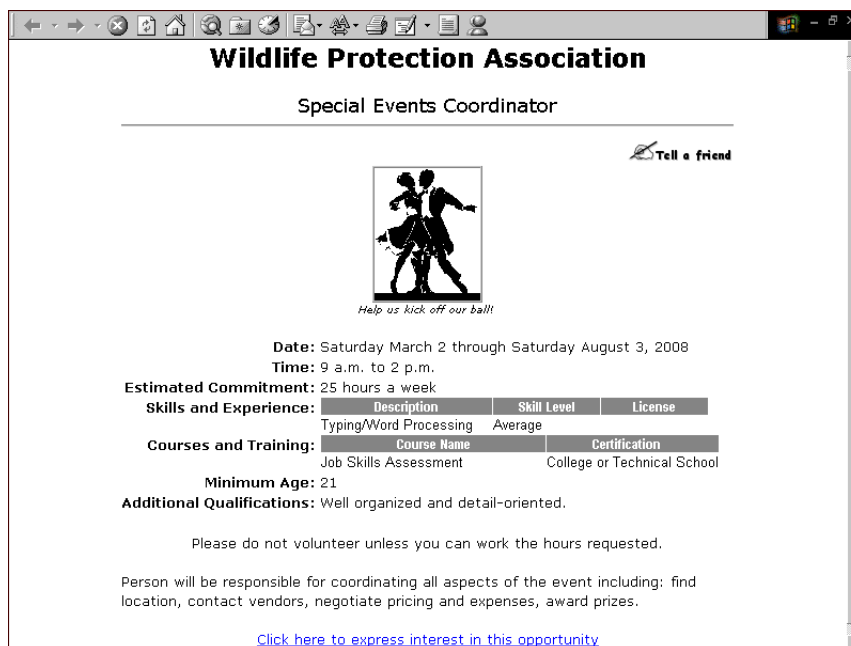
► Viewing an online job page

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

2. Click **NetVolunteers**. The NetSolutions - NetVolunteer screen appears.



3. Click the **Visit this job page** link. The Web page appears.



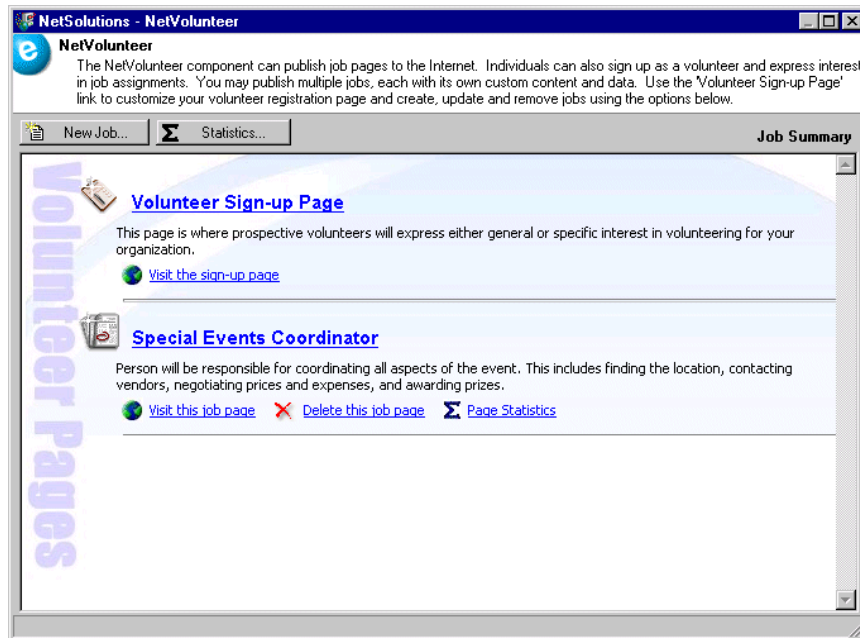
4. To exit the Web page and return to NetSolutions - NetVolunteer screen, click the "X" in the upper right corner.

Deleting a Job Web Page

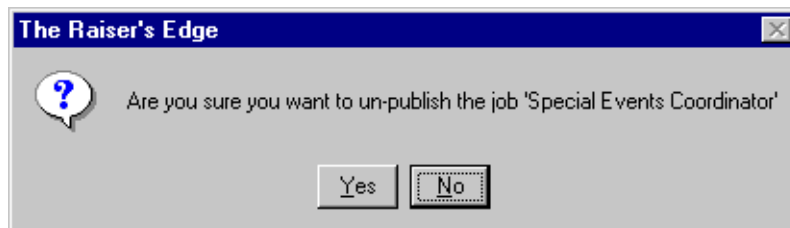
Once an online job page has served its purpose, you can permanently remove it from your Web site.

► **Deleting an online job page**

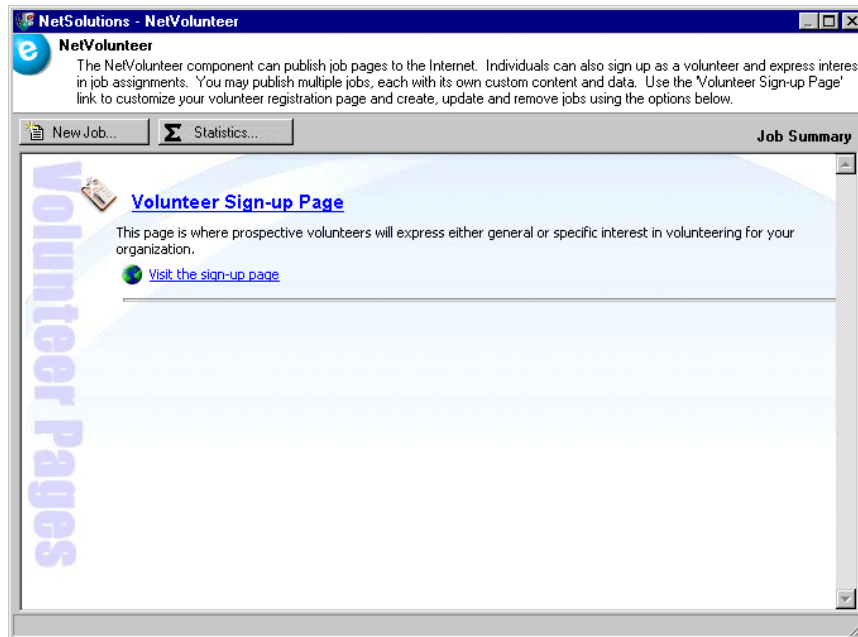
1. On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **NetVolunteers**. The NetSolutions - NetVolunteer screen appears.



3. Under the Web page link that you want to delete, click **Delete this job page**. A warning message appears.



4. Click **Yes**. The NetSolutions - NetVolunteer screen appears, minus the deleted job Web page.



5. To exit this screen and return to the NetSolutions page, click the "X" in the upper right corner.

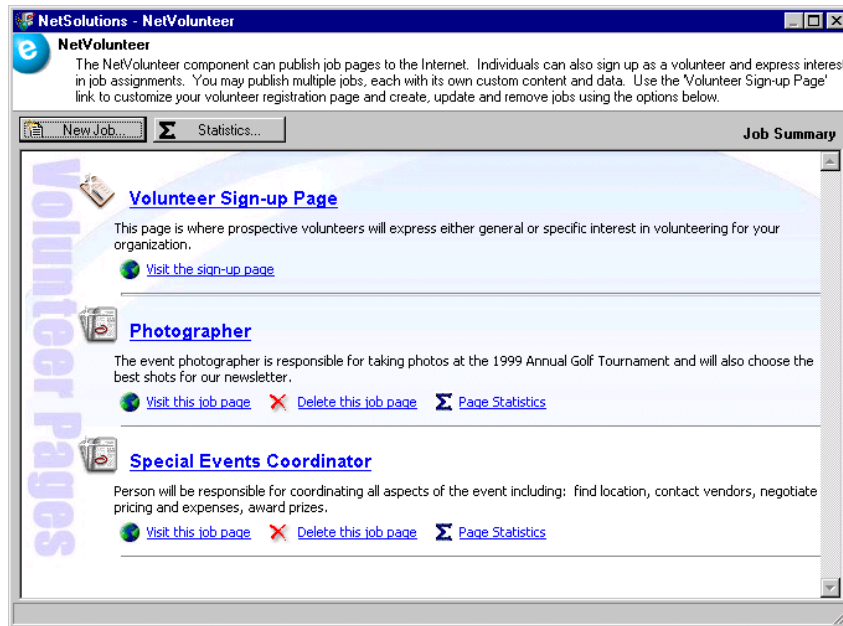
Viewing Volunteer Page Statistics

NetSolutions keeps track of how many times your online job pages are visited and how many volunteers each page attracts. You can view statistics for all job pages or for one page.

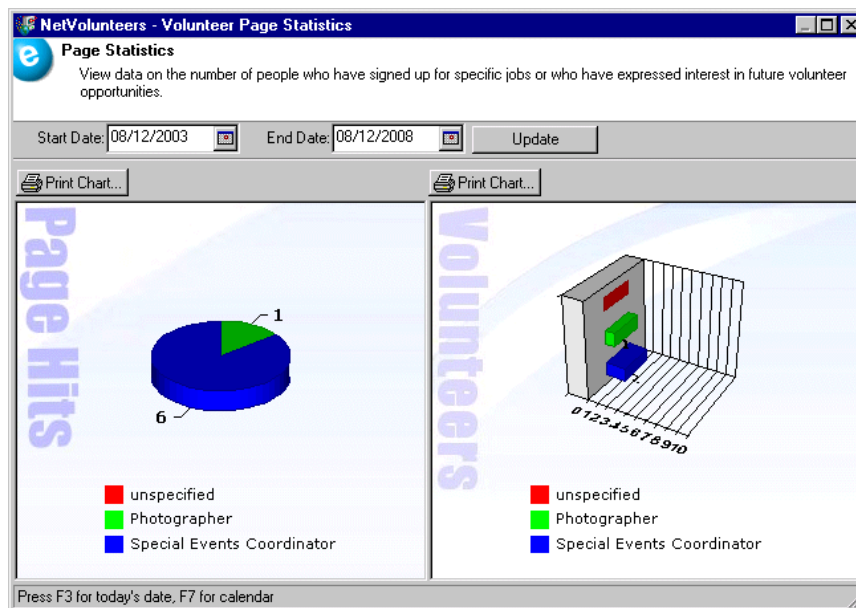
► Viewing volunteer page statistics

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

- Click **NetVolunteers**. The NetSolutions - NetVolunteer screen appears.

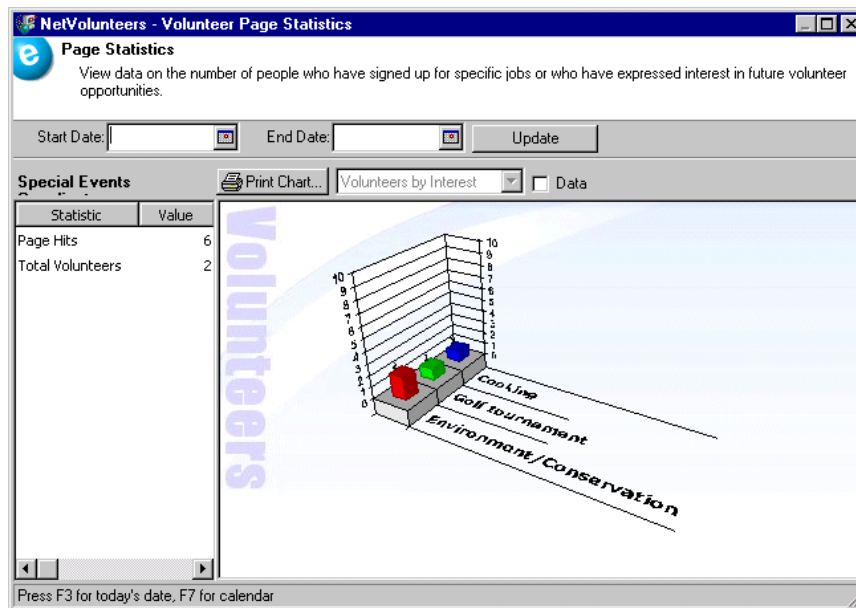


- To view a statistical overview of traffic and registrations on all your jobs pages, click the **Statistics** button. The Volunteer Page Statistics screen appears.



- On the left side of the screen, Page Hits, you can see how many times each job page was visited. In the preceding example, the Photographer page was visited one time and the Special Events Coordinator page was visited six times.
- On the right side of the screen, Volunteers, you can see how many volunteers registered on each page. In the preceding example, the Photographer page attracted one volunteer and the Special Events Coordinator page attracted two volunteers.
- To see statistics for a specific period, enter a **Start Date** and **End Date**, and click **Update**.
- Click **Print Chart** above each graph to print the graph.

4. To view statistics for a specific page from the NetVolunteers page, click **Page Statistics** below the job page link. The Statistics screen appears.



- To see statistics for a specific period, enter a **Start Date** and **End Date**, and click **Update**.
 - Click **Print Chart** above the graph to print the statistic information.
 - If you mark the **Data** checkbox, the graphic is replaced by columns, showing the **Interest** and the **Number** of volunteers for each interest.
 - The left side displays the number of Page Hits and Total Volunteers.
5. To close the screen and return to the NetSolutions - NetVolunteer screen, click the "X" in the upper right corner.

NetMembers

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With **NetMembers**, you can design a membership Web page and solicit for new members using your Web site. While designing the membership page, you decide the membership categories to advertise online. You can include pages for an unlimited number of membership categories.

You can also include links for renewing memberships, adding new memberships, set a default gift amount for the membership category, allow donors to select subcategories, select the gift types available for online memberships (credit card and/or pledges), allow gifts of membership, include a description of the membership category, add an image to the Web page, customize your confirmation message, and establish a default constituent code and fund for the downloaded gifts.

Warning: Before you start working in **NetMembers**, you must register as a *NetSolutions* user and enter your **Login ID** and **Login Password** in **Configure and Customize**. For more information, see “Registering with NetSolutions” on page 1 and “Configure & Customize” on page 11.

NetSolutions makes transferring online membership information into **The Raiser’s Edge** easy. Using the **Download Transactions** link, you can add the online information into the system and commit the new information to the proper records in **The Raiser’s Edge**. For more information about downloading transactions, see “Downloading Transactions” on page 295.

Finally, even though Blackbaud hosts your *NetSolutions* Web pages, you have a great deal of control over the design of these pages. Through the **Configure and Customize** link, you can select page and font colors, add images, include titles and descriptions, and much more. For more information about the **Configure and Customize** link, see “Configure & Customize” on page 11. You can also override the settings you specified in **Configure and Customize** on a page by page basis in each of the *NetMembers* pages you define.

Requirements for NetMembers

To use **NetMembers**, you must have the following:

- A Web page.
- *Internet Explorer* 5.x or higher is fully supported; however donors can use HTML 3.2 compliant browsers as well
- **The Raiser’s Edge 7.x**

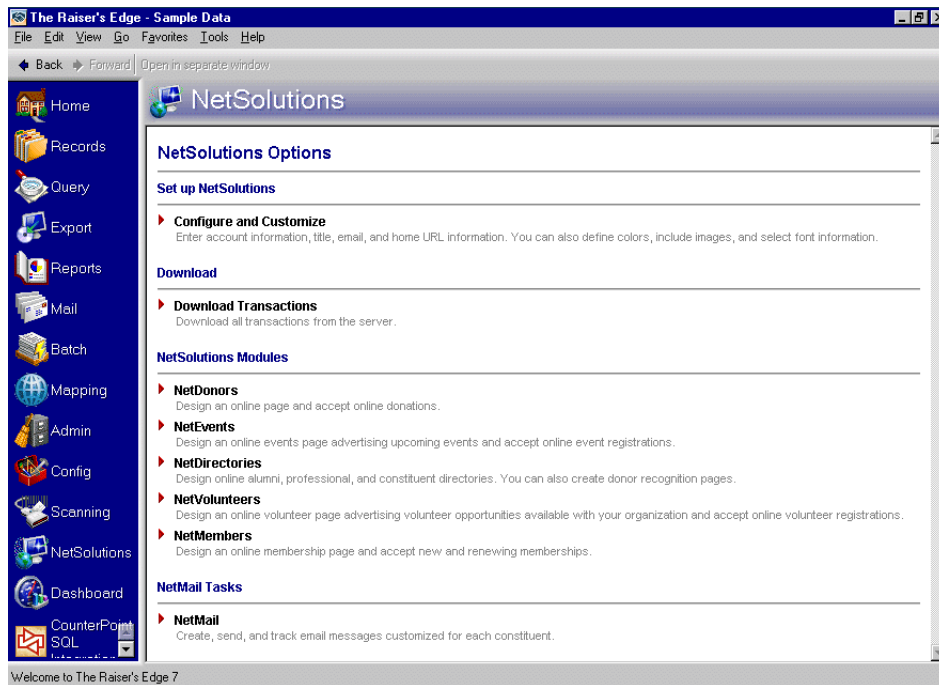
Warning: Before you start working in **NetMembers**, we recommend you familiarize yourself with *Membership Management* and read the *Membership Data Entry Guide*.

- *Membership Management*.

Navigating

Warning: Before you start working in **NetMembers**, you must register as a *NetSolutions* user and enter your **Login ID** and **Login Password** in **Configure and Customize**. For more information, see “Registering with NetSolutions” on page 1 and “Configure & Customize” on page 11.

In *The Raiser's Edge*, access **NetMembers** by clicking **NetSolutions** on the Raiser's Edge bar.

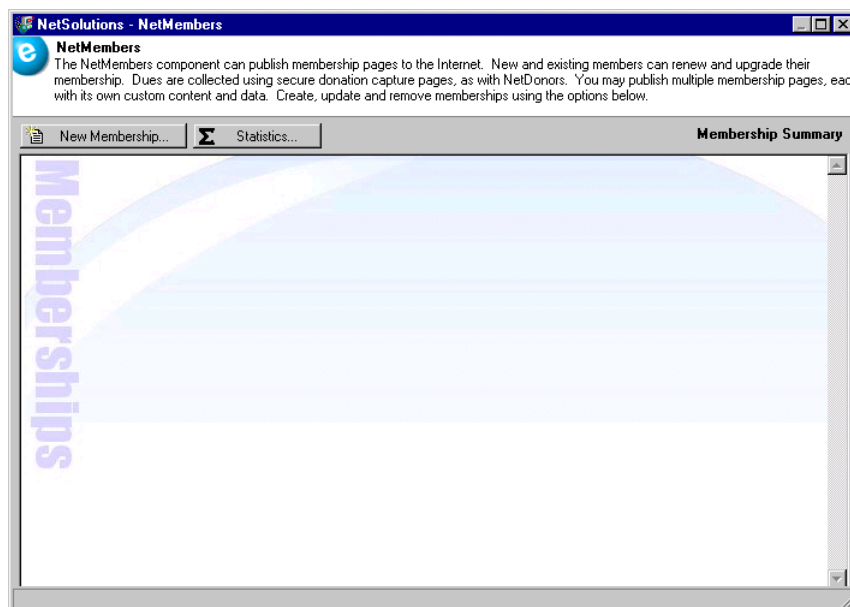


Accessing NetMembers

Multiple users can access different areas of *NetSolutions* simultaneously.

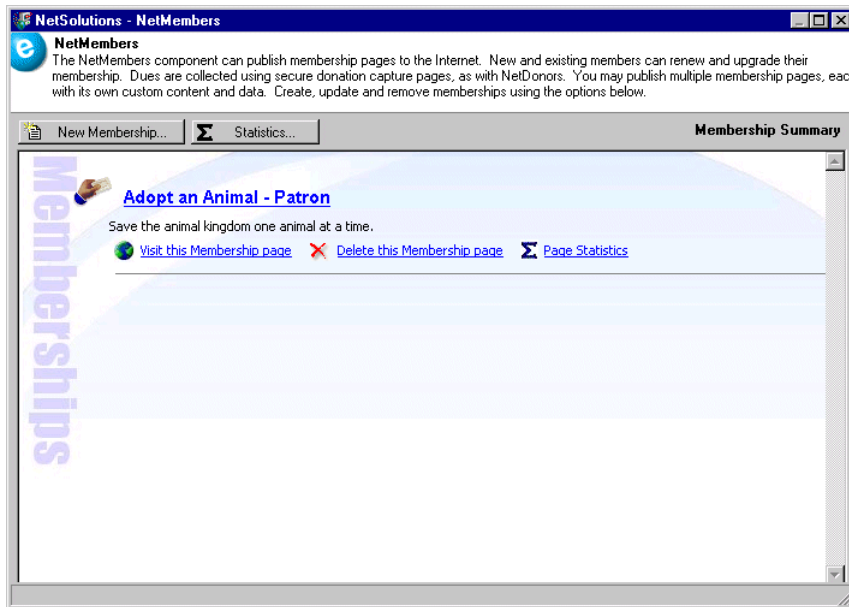
► Accessing NetMembers

1. On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **NetMembers**. The NetSolutions - NetMembers screen appears.



The first time you open **NetMembers**, it appears blank.

If you already created a NetMembers Web page, it appears on the NetSolutions - NetMembers screen as a link.



3. To open an existing online membership page, click the link. In the preceding example, click **Adopt an Animal - Patron**.
4. To exit this screen, click the "X" in the upper right corner. You return to the NetSolutions page.

NetMembers Buttons

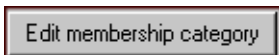
In **NetMembers**, three buttons help you work in the program.



The **New Membership** button on the NetSolutions - NetMembers screen opens the Web Membership Wizard, where you enter information for a new online membership page.



The **Statistics** button on the NetSolutions - NetMembers screen generates a chart, tracking activity on your membership Web page(s).



The **Edit membership category** button, available on the Web Membership Wizard screens, opens the selected membership category record in *The Raiser's Edge*. You can then make any necessary changes to the record before publishing it to your Web site.

Publishing Membership Information on Your Web Site

Warning: Before you start working in **NetMembers**, you must register as a *NetSolutions* user and enter your **Login ID** and **Login Password** in **Configure and Customize**. For more information, see “Registering with NetSolutions” on page 1 and “Configure & Customize” on page 11.

With **NetMembers**, visitors to your membership Web page can purchase or renew memberships for themselves and/or gift memberships for others. The online registration form requires they enter biographical information, such as name, address, and email information. Also, based on the selections you make when designing your online form, donors can create a login account, determine who receives the benefits included with a gift membership, include a personal message with gift memberships, and much more.

Publish a Membership Category to the Web

This is the first procedure, in a series of procedures, explaining the Web Membership Wizard. The following procedures should be used in succession.

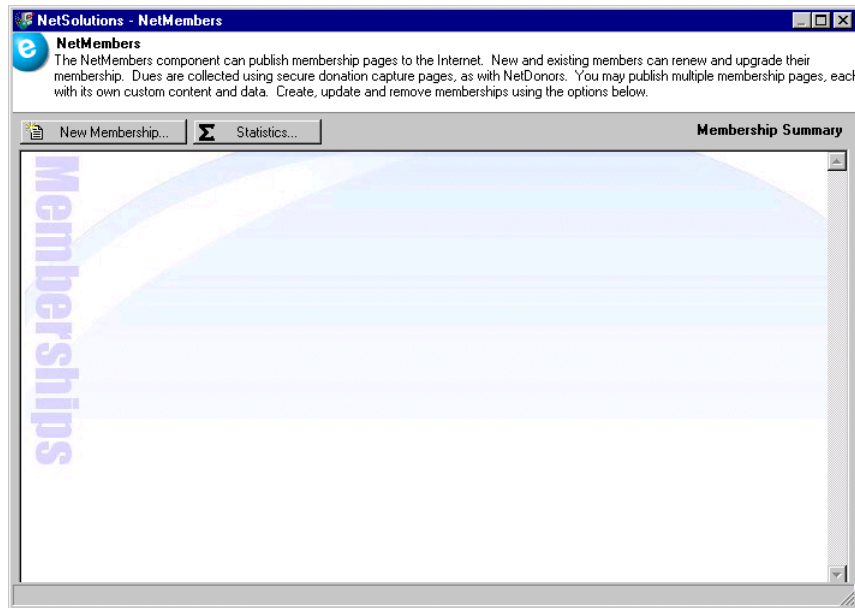
- “Publish a Membership Category to the Web” on page 262
- “Allow Donors to Join and to Renew?” on page 264
- “Allow Additional Donations?” on page 268
- “Gift Types” on page 270
- “Allow Gifts of Membership?” on page 272
- “Membership Description” on page 275
- “Page Style” on page 277
- “Customize the Membership Confirmation Message” on page 278
- “Default Settings for Downloads” on page 278
- “Sources” on page 280
- “Member Profiling” on page 282
- “Additional Links” on page 284
- “Internet Merchant Account” on page 286
- “Publish the Membership Category” on page 287

On the Publish a Membership Category to the Web screen, you select the membership category in ***The Raiser’s Edge*** to publish on your Web site.

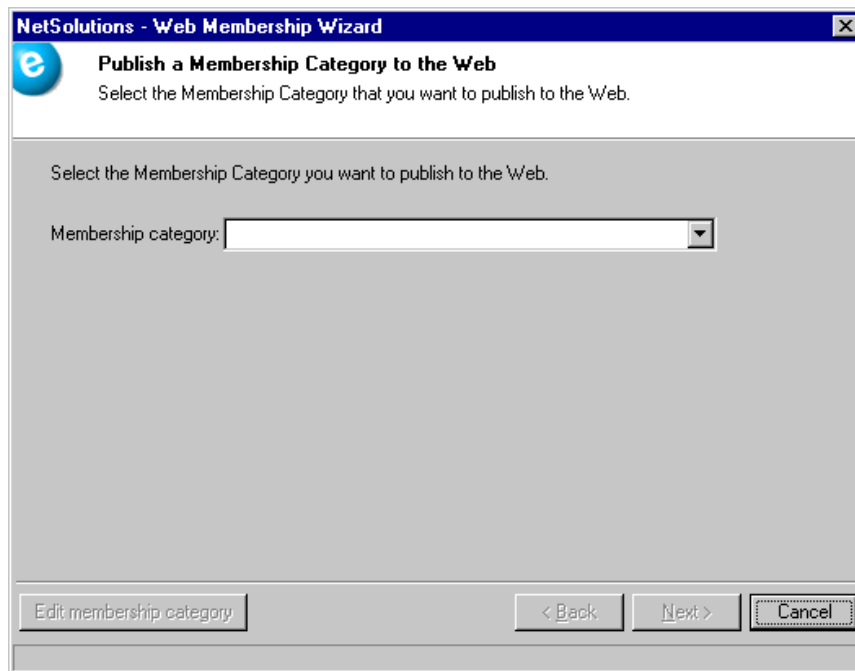
► Completing the Publish a membership category to the Web screen

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

2. Click **NetMembers**. The NetSolutions - NetMembers screen appears.

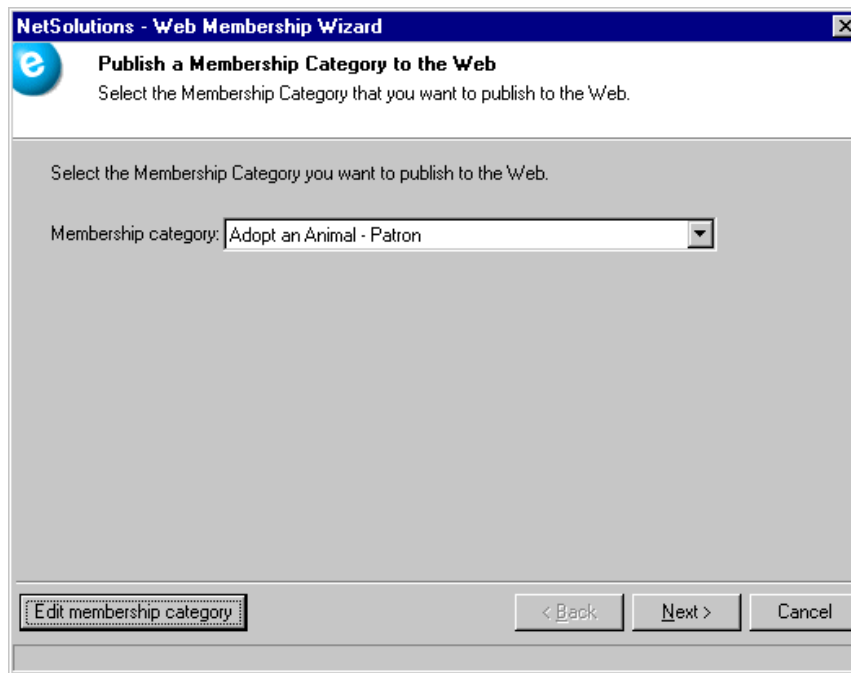


3. Click **New Membership**. The NetSolutions - Web Membership Wizard screen appears.



Note: For information about establishing membership categories in *Configuration*, see the Configuration chapter of the *Configuration & Security Guide*.

4. In the **Membership category** field, select the membership category to publish on your Web site. The options available depend on the membership categories you establish in *Configuration*.



Note: For information about working with membership categories, see the *Membership Data Entry Guide*.

5. To edit any information included in the selected membership category, click **Edit membership category** in the bottom left corner of the screen. The membership category record appears, and you can make the necessary changes. Click **Save and Close** to return to the NetSolutions - Web Membership Wizard screen. You can access the membership category record from anywhere on the NetSolutions - Web Membership Wizard.

Warning: If you click **Cancel**, any information you entered in the Web Membership Wizard is lost.

6. Click **Next** and move to the Allow Donors to Join and to Renew? screen, or click **Cancel** to return to the NetMembers page.

Allow Donors to Join and to Renew?

This is the second procedure, in a series of procedures, explaining the Web Membership Wizard. The following procedures should be used in succession.

- “Publish a Membership Category to the Web” on page 262
- “Allow Donors to Join and to Renew?” on page 264
- “Allow Additional Donations?” on page 268
- “Gift Types” on page 270
- “Allow Gifts of Membership?” on page 272
- “Membership Description” on page 275
- “Page Style” on page 277
- “Customize the Membership Confirmation Message” on page 278
- “Default Settings for Downloads” on page 278

- “Sources” on page 280
- “Member Profiling” on page 282
- “Additional Links” on page 284
- “Internet Merchant Account” on page 286
- “Publish the Membership Category” on page 287

If you choose to not allow donors to join or renew online, skip to “Membership Description” on page 275.

On the Allow donors to join and to renew? screen, you can allow visitors to your Web site to join your organization or renew an existing membership. You can also enter a default amount to appear on the Web page, allow donors to select a subcategory, and encourage donors to enter comments with their memberships dues.

► Completing the Allow donors to join and to renew? screen

1. From the Publish a Membership Category to the Web screen, click **Next**. The Allow donors to join and to renew? screen appears.

2. Mark **Allow donors to join online** and online donors can establish new memberships from your Web site. A link is added to your Web page.

[Click here to join](#)

When they click this link, they are taken to the Registration Information screen online.

3. Mark **Allow donors to renew a membership online** and existing members can renew from your Web site. A link is added to your Web page.

[Click here to renew](#)

When they click this link, they are taken to the Registration Information screen online. If they established a login ID and password, they can skip this screen and go directly to entering membership dues information and payment information.

4. If the membership category requires a fee, mark the **A membership fee is required for this membership** checkbox.

This is what your online visitors will see.

Membership Dues Information		Show Bio
Membership Type	Renewal of Membership	
Group*	Bear	
Amount*	☒ \$50.00 ☐ Other amount: \$ ☐ I wish to waive all benefits.	
Payment Information		
Billing Option*	☒ Credit Card ☐ Bill me later	
Credit Card Number*		
Type / Expiration Date*	MasterCard 08/2008 (mm/yyyy)	
Cardholder's Name*	Linda Kennedy	
Card Security Code*		? Help
Comments		
Proceed to Verification		

Both the **Membership Dues Information** and **Payment Information** frames are added to your membership Web page.

If no fee is required, do not mark the **A membership fee is required for this membership** checkbox.

Membership Information		Show Bio
Membership Type	New Membership	
Group*	Bear	
	☐ I wish to waive all benefits.	
Proceed to Verification		

Only a **Membership Information** frame is added to your membership Web page.

5. In the **Default gift amount** field, if you marked the **A membership fee is required for this membership** checkbox, you can enter an amount for the online memberships.

Membership Dues Information [Show Bio](#)

Membership Type Renewal of Membership

Group* Bear

Amount* ☒ \$50.00
☐ Other amount: \$
☐ I wish to waive all benefits.

Payment Information

Billing Option* ☒ Credit Card ☐ Bill me later

Credit Card Number*

Type / Expiration Date* MasterCard 08/2008 (mm/yyyy)

Cardholder's Name* Linda Kennedy

Card Security Code* [? Help](#)

Comments

[Proceed to Verification](#)

The amount is then included on your membership page as a suggested donation.

6. On the Allow donors to join and to renew? screen, the **Allow the donor to select a subcategory** checkbox allows donors to select a membership subcategory when entering membership information. For example, the Adopt an Animal category may have the subcategories of Lion, Panda, Koala, Polar Bear, and Sea Turtle. If you mark this checkbox, the **Group** field is added to your Web page.

Membership Dues Information [Show Bio](#)

Membership Type Renewal of Membership

Group* Bear

Amount* ☒ \$50.00
☐ Other amount: \$
☐ I wish to waive all benefits.

The subcategory information must exist on the **Raiser's Edge** membership category in order for it to appear online. If no subcategory information is entered on the membership category, and you mark the **Allow the donor to select a subcategory** checkbox, no subcategory options appear on the online membership page.

7. On the Allow donors to join and to renew? screen, mark **Allow the donor to enter comments with their membership dues** and a **Comments** box appears with the online membership registration form.

Warning: If you click **Cancel**, any information you entered in the Web Membership Wizard is lost.

8. On the Allow donors to join and to renew? screen, mark **Allow the donor to waive benefits** and a **checkbox** appears with the online membership registration form. If you do not mark **Allow the donor to waive benefits** the checkbox does not appear on the Web page.

9. On the Allow donors to join and to renew? screen, mark **Allow donors to give anonymously** and a **checkbox** appears with the online membership registration form. If you do not mark **Allow donors to give anonymously** the checkbox does not appear on the Web page.

10. Click **Next** and move to the Allow Additional Donations? screen, or click **Cancel** to return to the NetMembers page. If you choose to not allow donors to join or renew online, skip to “Membership Description” on page 275.

Allow Additional Donations?

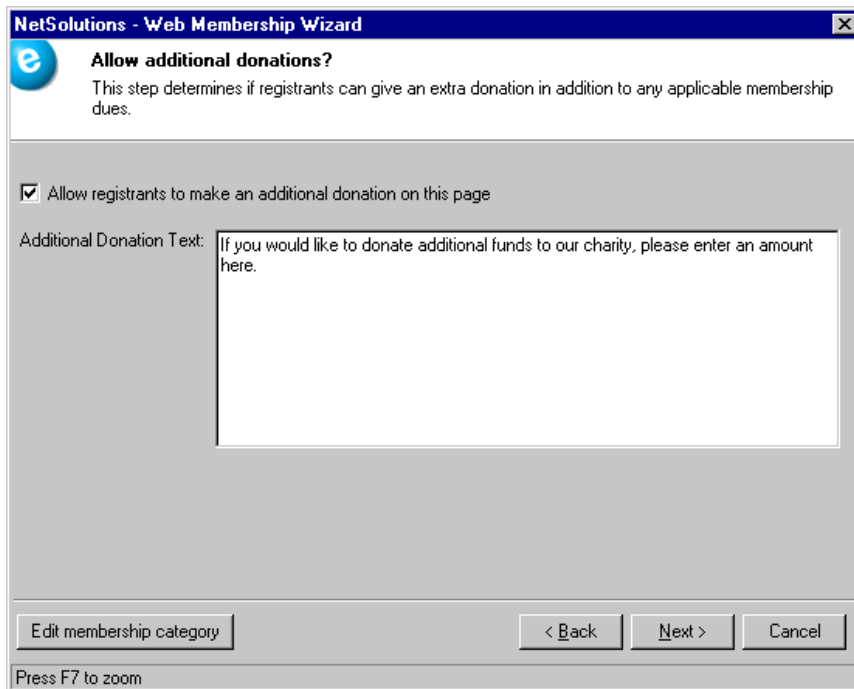
If you choose to allow donors to join or renew online this is the third procedure, in a series of procedures, explaining the Web Membership Wizard. The following procedures should be used in succession.

- “Publish a Membership Category to the Web” on page 262
- “Allow Donors to Join and to Renew?” on page 264
- “Allow Additional Donations?” on page 268
- “Gift Types” on page 270
- “Allow Gifts of Membership?” on page 272
- “Membership Description” on page 275
- “Page Style” on page 277
- “Customize the Membership Confirmation Message” on page 278
- “Default Settings for Downloads” on page 278
- “Sources” on page 280
- “Member Profiling” on page 282
- “Additional Links” on page 284
- “Internet Merchant Account” on page 286
- “Publish the Membership Category” on page 287

On the Allow additional donations? screen, you choose whether users can make additional donations during the registration process.

► **Completing the Allow additional donations? screen**

1. From the Allow donors to join and to renew screen, click **Next**. The Allow additional donations? screen appears.



The screenshot shows a window titled "NetSolutions - Web Membership Wizard" with a close button in the top right corner. The window has a blue header bar with a white 'e' logo on the left. Below the header, the title "Allow additional donations?" is displayed in bold, followed by a descriptive sentence: "This step determines if registrants can give an extra donation in addition to any applicable membership dues." Below this, there is a checkbox labeled "Allow registrants to make an additional donation on this page" which is checked. Underneath the checkbox, the text "Additional Donation Text:" is followed by a text area containing the message: "If you would like to donate additional funds to our charity, please enter an amount here." At the bottom of the window, there is a button labeled "Edit membership category" on the left, and three buttons labeled "< Back", "Next >", and "Cancel" on the right. A status bar at the very bottom indicates "Press F7 to zoom".

2. To allow additional donations to be made during the registration process, mark the **Allow registrants to make an additional donation on this page** checkbox.

3. Add the additional text to be included in the **Additional Donation Text** field. The text will appear as it is entered on the page in a separate **Additional Donation** frame. There is 255 character limitation.

Warning: If you click **Cancel**, any information you entered in the Web Membership Wizard is lost.

4. Click **Next** and move to the Gift Types screen, or click **Cancel** to return to the NetMembers page.

Gift Types

If you choose to allow donors to join or renew online this is the fourth procedure, in a series of procedures, explaining the Web Membership Wizard. The following procedures should be used in succession.

- “Publish a Membership Category to the Web” on page 262
- “Allow Donors to Join and to Renew?” on page 264
- “Allow Additional Donations?” on page 268
- “Gift Types” on page 270
- “Allow Gifts of Membership?” on page 272
- “Membership Description” on page 275
- “Page Style” on page 277
- “Customize the Membership Confirmation Message” on page 278
- “Default Settings for Downloads” on page 278
- “Sources” on page 280
- “Member Profiling” on page 282
- “Additional Links” on page 284
- “Internet Merchant Account” on page 286
- “Publish the Membership Category” on page 287

On the Gift Types screen, you can select the gift types available to members registering online: **Credit card gifts** and **Credit card gifts and Pledges**.

► **Completing the Gift types screen**

1. From the Allow additional donations? screen, click **Next**. The Gift Types screen appears.

NetSolutions - Web Membership Wizard

Gift Types
This step allows you to specify the type of gifts that the donor can enter on this membership page.

On this membership page allow the donor to enter:

☒ Credit card gifts

☐ Credit card gifts and Pledges

Edit membership category < Back Next > Cancel

2. When you select **Credit card gifts**, visitors to your membership Web page must use a credit card when renewing or creating a membership.

Payment Information

Credit Card Number*

Type / Expiration Date* MasterCard 08/2008 (mm/yyyy)

Cardholder's Name* Linda Kennedy

Card Security Code* ? Help

Comments

Note: For more information about pledges, see the Pledges chapter of the *Gift Records Guide*.

3. When you select **Credit card gifts and Pledges**, visitors to your membership Web page can use a credit card or select the **Bill me later** option when renewing or creating a membership.

The screenshot shows a form titled "Payment Information". It has two radio buttons for "Billing Option*": "Credit Card" (selected) and "Bill me later". Below this is a text field for "Credit Card Number*". Then, a "Type / Expiration Date*" section with a dropdown menu showing "MasterCard" and a date field showing "08/2008" with a "(mm/yyyy)" label. Below that is a text field for "Cardholder's Name*" containing "Linda Kennedy". Then a text field for "Card Security Code*" with a "? Help" link. Finally, a large text area for "Comments".

Warning: If you click **Cancel**, any information you entered in the Web Membership Wizard is lost.

4. Click **Next** and move to the Allow Gifts of Membership? screen, or click **Cancel** to return to the NetMembers page.

Allow Gifts of Membership?

If you choose to allow donors to join or renew online this is the fifth procedure, in a series of procedures, explaining the Web Membership Wizard. The following procedures should be used in succession.

- "Publish a Membership Category to the Web" on page 262
- "Allow Donors to Join and to Renew?" on page 264
- "Allow Additional Donations?" on page 268
- "Gift Types" on page 270
- "Allow Gifts of Membership?" on page 272
- "Membership Description" on page 275
- "Page Style" on page 277
- "Customize the Membership Confirmation Message" on page 278
- "Default Settings for Downloads" on page 278
- "Sources" on page 280
- "Member Profiling" on page 282
- "Additional Links" on page 284
- "Internet Merchant Account" on page 286
- "Publish the Membership Category" on page 287

On the Allow gifts of membership? screen, you allow visitors to your Web site to give a gift of membership.

► **Completing the Allow gifts of membership? screen**

1. From the Gift Types screen, click **Next**. The Allow gifts of membership? screen appears.

2. To activate the checkboxes included on this screen mark **Allow gifts of membership**. If you mark this checkbox alone the **This is a gift of membership** frame is added to your Web page, including fields for the gift recipient's name and address information.

3. When you allow gifts of membership, you can mark any of the following checkboxes, governing how the gift membership can be handled by the donor.
 - **Allow the donor to choose who should receive benefits:** Membership benefits are gifts your organization gives to constituents, depending on their level of membership or the dues they pay. Mark this checkbox so your online donors can decide if they should receive the membership benefits or the person receiving the gift of membership should receive the benefits.

The **Send benefits to** field is added to the **This is a gift of membership** frame.

If this is a gift of membership, enter the gift recipient's information below: Hide Details

Title

First Name

Last Name

Address

City, State ZIP ,

Country

Phone

E-mail

Send benefits to ☒ Member ☐ Donor

Note: The **Allow the donor to choose who should receive renewal notice** checkbox is disabled if on the **Raiser's Edge** membership category the Renewal Information tab includes renewal instructions, governing gifts of membership.

- **Allow the donor to choose who should receive renewal notices:** Membership renewal notices serve as a reminder to constituents that a membership is about to expire. Mark this checkbox so your online donors can decide if they should receive the renewal notice, if the person receiving the gift of membership should receive the renewal notice, or if both should receive the renewal notice.

The **Send renewal notices to** field is added to the **This is a gift of membership** frame.

If this is a gift of membership, enter the gift recipient's information below: Hide Details

Title

First Name

Last Name

Address

City, State ZIP ,

Country

Phone

E-mail

Send renewal notices to ☒ Member ☐ Donor ☐ Both

- **Allow the donor to include a special message with the gift of membership:** This allows the donor to personalize the gift of membership with a note to include when you notify the recipient of the gift.

The **Special message** field is added to the **This is a gift of membership** frame.

If this is a gift of membership, enter the gift recipient's information below: Hide Details

Title

First Name

Last Name

Address

City, State ZIP ,

Country

Phone

E-mail

Send renewal notices to ☒ Member ☐ Donor ☐ Both

Send benefits to ☒ Member ☐ Donor

Special message

Warning: If you click **Cancel**, any information you entered in the Web Membership Wizard is lost.

- Click **Next** and move to the Membership Description screen, or click **Cancel** to return to the NetMembers page.

Membership Description

If you selected the Allow members to join and to renew? screen this is the sixth procedure, in a series of procedures, explaining the Web Membership Wizard. The following procedures should be used in succession.

- “Publish a Membership Category to the Web” on page 262
- “Allow Donors to Join and to Renew?” on page 264
- “Allow Additional Donations?” on page 268
- “Gift Types” on page 270
- “Allow Gifts of Membership?” on page 272
- “Membership Description” on page 275
- “Page Style” on page 277
- “Customize the Membership Confirmation Message” on page 278
- “Default Settings for Downloads” on page 278
- “Sources” on page 280
- “Member Profiling” on page 282
- “Additional Links” on page 284
- “Internet Merchant Account” on page 286
- “Publish the Membership Category” on page 287

On the Membership description screen, you enter information describing your online membership category. You can enter a category name, a description, dues, and details about the membership. You can also include an image and caption.

► **Completing the Membership description screen**

1. From the Allow gift of membership? screen, click **Next**. The Membership description screen appears.

Note: For information about establishing membership categories in *Configuration*, see the Configuration chapter of the *Configuration & Security Guide*.

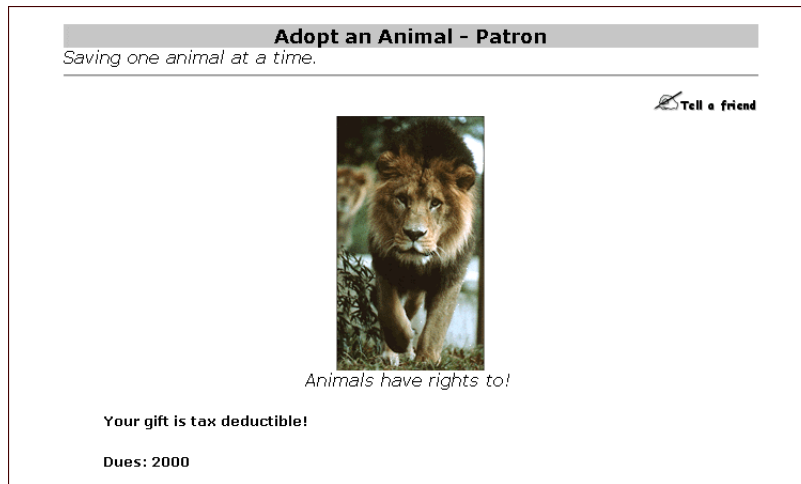
2. The **Category** and **Dues** fields fill in automatically, based on the membership category you selected. On the Web page, the **Category** information appears at the top of the page, under the **Title** information you entered in **Configure and Customize**.
3. In the **Description** box, enter information describing the membership category. On the Web page, this appears under the **Category** name. There is a 1,024 character limit.
4. In the **Details** box, enter any additional membership information. For example, you can remind potential members that their dues are tax-deductible. There is a 2,147,483,647 character limitation.
5. In the first **Image/Caption** field, you can include an image on your membership Web page. To access the Open screen, click the ellipsis.

Select the image file to include on the Web page, and click **Open** to return to NetSolutions - Web Membership Wizard screen.

In the second **Image/Caption** field, you can enter a caption to appear under the image.

6. In **Configure and Customize**, you design a **Tell a Friend** link, which appears on your Web pages. The link takes visitors to another page, where they can enter contact information about their friend. If you do not want this link to appear on your membership page, unmark the **Display Tell a Friend** checkbox. Keep the checkbox marked if you want the link to appear on your membership page.

7. To see how the information you added on this screen appears on the Web page, you can use the zoom button provided to the right of the sample screen. This enlarges the screen so you can better see how your Web page will look. Or, you can click **Preview**.



Warning: If you click **Cancel**, any information you entered in the Web Membership Wizard is lost.

8. From the Membership description screen, click **Next** and move to the Page Style screen, or click **Cancel** to return to the NetMembers page. If you choose to not allow donors to join or renew online, skip to "Publish the Membership Category" on page 287.

Page Style

If you choose to allow donors to join or renew online this is the seventh procedure, in a series of procedures, explaining the Web Membership Wizard. The following procedures should be used in succession.

- "Publish a Membership Category to the Web" on page 262
- "Allow Donors to Join and to Renew?" on page 264
- "Allow Additional Donations?" on page 268
- "Gift Types" on page 270
- "Allow Gifts of Membership?" on page 272
- "Membership Description" on page 275
- "Page Style" on page 277
- "Customize the Membership Confirmation Message" on page 278
- "Default Settings for Downloads" on page 278
- "Sources" on page 280
- "Member Profiling" on page 282
- "Additional Links" on page 284
- "Internet Merchant Account" on page 286
- "Publish the Membership Category" on page 287

Using the Page Style screen, you can give your membership page a unique look, setting it apart from your other *NetSolutions* pages. The style you established in **Configure and Customize** defaults to all of your *NetSolutions* Web pages, but you can change the style for each membership page using the Page Style screen. The fields and checkboxes available on this screen change based on the **Page section** you select. You can change the background, logo and title, image, header, detail, body, table legend, table headers, table text, and error text styles. For detailed information about each option, see “Changing Page Style” on page 387.

If you are happy with the page style you established in **Configure and Customize**, do not make any changes on this screen, and click **Next** to move to the Customize the Membership Confirmation Message screen.

Customize the Membership Confirmation Message

If you choose to allow donors to join or renew online, this is the eighth procedure in a series of procedures, explaining the Web Membership Wizard. The following procedures should be used in succession.

- “Publish a Membership Category to the Web” on page 262
- “Allow Donors to Join and to Renew?” on page 264
- “Allow Additional Donations?” on page 268
- “Gift Types” on page 270
- “Allow Gifts of Membership?” on page 272
- “Membership Description” on page 275
- “Page Style” on page 277
- “Customize the Membership Confirmation Message” on page 278
- “Default Settings for Downloads” on page 278
- “Sources” on page 280
- “Member Profiling” on page 282
- “Additional Links” on page 284
- “Internet Merchant Account” on page 286
- “Publish the Membership Category” on page 287

With **NetMembers**, you can customize membership confirmation messages automatically sent via email to your online registrants. For more information, see “Customizing Confirmations” on page 367.

Warning: If you click **Cancel**, any information you entered in the Web Membership Wizard is lost.

When you have completed customizing your confirmation message click **Next** and move to the Default Settings for Downloads screen, or click **Cancel** to return to the NetMembers page.

Default Settings for Downloads

If you choose to allow donors to join or renew online, this is the ninth procedure in a series of procedures, explaining the Web Membership Wizard. The following procedures should be used in succession.

- “Publish a Membership Category to the Web” on page 262
- “Allow Donors to Join and to Renew?” on page 264
- “Allow Additional Donations?” on page 268
- “Gift Types” on page 270
- “Allow Gifts of Membership?” on page 272
- “Membership Description” on page 275

- “Page Style” on page 277
- “Customize the Membership Confirmation Message” on page 278
- “Default Settings for Downloads” on page 278
- “Sources” on page 280
- “Member Profiling” on page 282
- “Additional Links” on page 284
- “Internet Merchant Account” on page 286
- “Publish the Membership Category” on page 287

On the Default settings for Downloads screen, you can select the constituent code used when creating a constituent record and select the fund to use when creating a dues gift.

► **Customizing the Default settings for downloads screen**

1. When you complete the Customize the membership confirmation message screen, click **Next**. The Default settings for downloads screen appears.

Note: For information about constituent codes, see the *Constituent Data Entry Guide*.

2. In the **Select a constituent code to use when creating a constituent record** field, select the constituent code to assign online members who are not already constituents in your database. For example, if you select “Member”, when you commit the online information to **The Raiser’s Edge**, “Member” appears in the **Constituent Codes** grid on the Bio 2 tab of the constituent record.
3. In the **Enter the fund to use when creating membership dues gifts** field, select the **Raiser’s Edge** fund credited for any membership dues generated from your online membership page.

Warning: If you click **Cancel**, any information you entered in the Web Membership Wizard is lost.

4. Click **Next** and move to the Sources screen, or click **Cancel** to return to the NetMembers page.

Sources

If you choose to allow donors to join or renew online, this is the tenth procedure in a series of procedures, explaining the Web Membership Wizard. The following procedures should be used in succession.

- “Publish a Membership Category to the Web” on page 262
- “Allow Donors to Join and to Renew?” on page 264
- “Allow Additional Donations?” on page 268
- “Gift Types” on page 270
- “Allow Gifts of Membership?” on page 272
- “Membership Description” on page 275
- “Page Style” on page 277
- “Customize the Membership Confirmation Message” on page 278
- “Default Settings for Downloads” on page 278
- “Sources” on page 280
- “Member Profiling” on page 282
- “Additional Links” on page 284
- “Internet Merchant Account” on page 286
- “Publish the Membership Category” on page 287

Including source options on your membership page lets you know what attracted donors to your Web site. For instance, in the following example, the Wildlife Protection Association included “Visiting Web Site” and “Mailing” as source options. They also attached each source option to a *Raiser’s Edge* appeal. So, whenever a donor selects one of the source options, the corresponding appeal is credited with the donation.

► Customizing the Sources screen

1. Once you complete the Default settings for downloads screen, click **Next**. The Sources screen appears. If you include sources on your membership page, you can keep track of what draws donors to your Web site. You can also credit appeal records for any gifts.

NetSolutions - Web Membership Wizard

Sources

When you want members to indicate how they heard about your site, enter each source as it should appear on the membership page. Beside each source, enter the appeal associated with it. Optionally, you can select an appeal to use if the member does not indicate a source.

Source header:

Online Source	Appeal to Credit

If no source is specified use this appeal:

2. In the **Source header** field, enter a heading for the online source section of your Web page. There is a 255 character limitation.
3. In the **Online Source** column, enter the options to appear on your Web page. In the following example, the Wildlife Protection Association included “Visiting Web Site” and “Mailing” as source options.
4. In the **Appeal to Credit** column, enter the appeal credited with donations associated with the source.
5. In the **If no source is specified use this appeal** field, select a default appeal to use should the donor not select a source. For instance, in the following example, donors have two source options to select when giving online: “Visiting Web Site” or “Mailing”. If they select “Visiting Web Site” the “Internet/Web Site solicitations” appeal is credited for the donation; if they select “Mailing” the “Direct Mailing” appeal is credited for the donation. If no source is selected, the “Internet/Web Site solicitations” appeal is credited for the donation.

NetSolutions - Web Membership Wizard

Sources
When you want members to indicate how they heard about your site, enter each source as it should appear on the membership page. Beside each source, enter the appeal associated with it. Optionally, you can select an appeal to use if the member does not indicate a source.

Source header: How did you hear about us?

Online Source	Appeal to Credit
Visiting Web Site	Internet/Web Site solicitations
Mailing	Direct Mailing

If no source is specified use this appeal: Internet/Web Site solicitations

Edit membership category < Back Next > Cancel

Information entered in the example above appears as a drop-down menu at the bottom of your donation page.

This is what your online donor sees.

How did you hear about us?

Source

- Visiting Web Site
- Mailing

Warning: If you click **Cancel**, any information you entered in the Web Membership Wizard is lost.

6. Click **Next** and move to the Member Profiling screen, where you can enter member profiles, or click **Cancel** to return to the NetSolutions page.

Member Profiling

If you choose to allow donors to join or renew online, this is the eleventh procedure in a series of procedures, explaining the Web Membership Wizard. The following procedures should be used in succession.

- “Publish a Membership Category to the Web” on page 262
- “Allow Donors to Join and to Renew?” on page 264
- “Allow Additional Donations?” on page 268
- “Gift Types” on page 270
- “Allow Gifts of Membership?” on page 272
- “Membership Description” on page 275
- “Page Style” on page 277
- “Customize the Membership Confirmation Message” on page 278
- “Default Settings for Downloads” on page 278
- “Sources” on page 280
- “Member Profiling” on page 282
- “Additional Links” on page 284
- “Internet Merchant Account” on page 286
- “Publish the Membership Category” on page 287

Member profiling allows you to include questions on your membership page to gather additional information from your members. These questions can help you segment, target, and cultivate your constituency. On the Member Profiling screen, you can enter profiling questions specific to this page. The default profiling information, used for all *NetSolutions* functions, is entered in **Configure and Customize**.

► **Adding member profiling information for your membership page**

1. Once you complete the Sources screen, click **Next**. The Member Profiling screen appears, so you can enter member profiling questions for this membership page. On this screen, you can enter questions to appear on your membership page. The questions help you better understand your members.

The screenshot shows a window titled "NetSolutions - Web Membership Wizard" with a close button in the top right corner. Inside the window, there is a blue circular icon with a white 'e' on the left. To its right, the text "Member Profiling" is displayed in bold. Below this, a paragraph reads: "Use Member Profiling questions to gather additional information from your Web users that will help segment, target, and cultivate your constituency." Below the text is a table with two columns: "Profiling Question" and "Attribute to Use". The first row of the table contains the text "Did you receive our mailing?" under the first column and "Mailing" under the second column. Below the table is a large, empty gray rectangular area. At the bottom of the window, there are three buttons: "Edit membership category" on the left, and "< Back" and "Next >" in the center, with a "Cancel" button on the right.

Profiling Question	Attribute to Use
Did you receive our mailing?	Mailing

Buttons at the bottom: Edit membership category, < Back, Next >, Cancel

- For example, in the **Donor Profiling Question** column, you can ask the question, “Did you receive our mailing?”. This question then appears at the end of the membership registration page. The question is limited to 120 characters.

Please enter your information below. When you are finished, click Continue.

*** Denotes Required Information**

Your Registration Information

Title	
First Name	
Last Name*	
Address*	
City, State ZIP*	,
Country*	United States
Phone	
Fax	
E-mail*	

☒ I wish to receive future e-mail correspondence.
☐ I prefer to make my donations anonymously.

Additional Information

☐ Did you receive our mailing?

Continue >

Note: Only yes/no constituent attributes appear in the **Attribute to Use** column.

- In the **Attribute to Use** column, you must assign the question to a constituent attribute in your database. In the example above, if the registrant marks **Did you receive our mailing?** on the membership registration page, the information appears on the Attributes tab of the constituent record.

On the constituent record, “Mailing” appears in the **Category** column and “Yes” appears in the **Description** column.

Warning: If you click **Cancel**, any information you entered in the Web Membership Wizard is lost.

- From the Web Membership Wizard screen, click **Next** and move to the Additional Links screen.

Additional Links

If you choose to allow donors to join or renew online, this is the twelfth procedure in a series of procedures, explaining the Web Membership Wizard. The following procedures should be used in succession.

- “Publish a Membership Category to the Web” on page 262
- “Allow Donors to Join and to Renew?” on page 264
- “Allow Additional Donations?” on page 268
- “Gift Types” on page 270

- “Allow Gifts of Membership?” on page 272
- “Membership Description” on page 275
- “Page Style” on page 277
- “Customize the Membership Confirmation Message” on page 278
- “Default Settings for Downloads” on page 278
- “Sources” on page 280
- “Member Profiling” on page 282
- “Additional Links” on page 284
- “Internet Merchant Account” on page 286
- “Publish the Membership Category” on page 287

From the Additional Links screen, you can add links to related Web pages. For example, you can add a link to a detailed explanation of your privacy policy.

► Adding links to your online membership page

1. Once you complete the Donor Profiling screen, click **Next**. The Additional Links screen appears so you can add links to your membership page.

Image	Caption	URL
<image>	Animals you can adopt.	http://adoptanimals.com

Buttons at the bottom: Edit membership category, < Back, Next >, Cancel

2. In the **Image** column, you must map to an image to use as the hyperlink on your membership page.
3. In the **Caption** column, enter the text visitors see when they hover their mouse over the hyperlink image.
4. In the **URL** column, enter the address of the Web page to which you are adding a link. The column accepts the URL with or without the <http://.
5. The **Path** column displays the location of the **Image** you selected.

Warning: If you click **Cancel**, any information you entered in the Web Membership Wizard is lost.

6. From the Additional Links screen, click **Next** and move to the Internet Merchant Account screen.

Internet Merchant Account

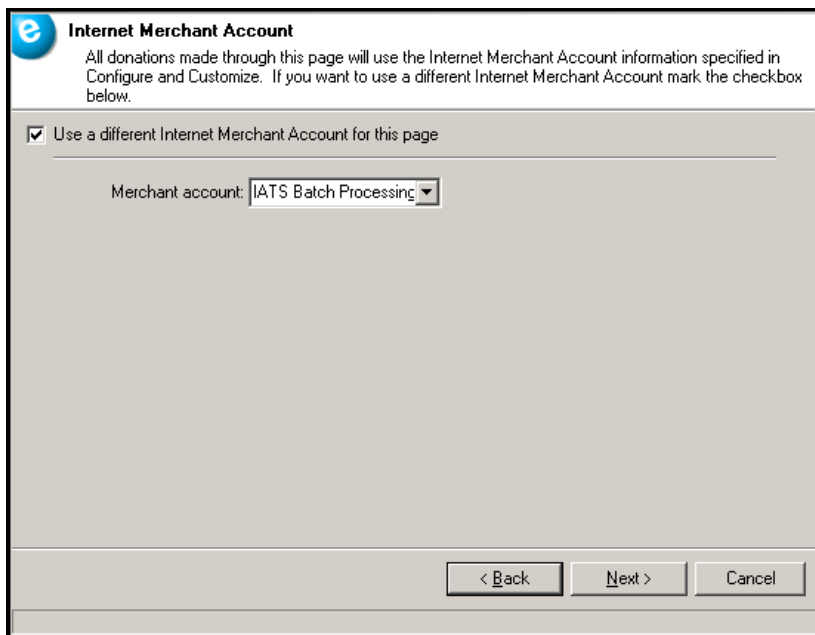
If you choose to allow donors to join or renew online, this is the thirteenth procedure in a series of procedures, explaining the Web Membership Wizard. The following procedures should be used in succession.

- “Publish a Membership Category to the Web” on page 262
- “Allow Donors to Join and to Renew?” on page 264
- “Allow Additional Donations?” on page 268
- “Gift Types” on page 270
- “Allow Gifts of Membership?” on page 272
- “Membership Description” on page 275
- “Page Style” on page 277
- “Customize the Membership Confirmation Message” on page 278
- “Default Settings for Downloads” on page 278
- “Sources” on page 280
- “Member Profiling” on page 282
- “Additional Links” on page 284
- “Internet Merchant Account” on page 286
- “Publish the Membership Category” on page 287

On the Internet Merchant Account screen, you can change the internet merchant account used for this membership Web page. The default internet merchant account, used for all *NetSolutions* functions, is entered in **Configure and Customize**.

► Changing membership Internet merchant account information

1. Once you complete the Additional Links screen, click **Next**. The Internet Merchant Account screen appears so you can enter a different Internet merchant account for this membership page.



2. To activate this screen, mark **Use a different Internet Merchant Account for this page**.

3. In the **Merchant account** field, select the account you want used for this page. You establish accounts in **Business Rules** accessed through *Config*

Warning: If you click **Cancel**, any information you entered in the Web Membership Wizard is lost.

4. Click **Next** and move to the Publish the Membership Category screen, where you can complete your NetMembers page, or click **Cancel** to return to the NetSolutions - NetMembers page.

Publish the Membership Category

This is the last procedure in a series of procedures, explaining the Web Membership Wizard. The following procedures should be used in succession.

- “Publish a Membership Category to the Web” on page 262
- “Allow Donors to Join and to Renew?” on page 264
- “Allow Additional Donations?” on page 268
- “Gift Types” on page 270
- “Allow Gifts of Membership?” on page 272
- “Membership Description” on page 275
- “Page Style” on page 277
- “Customize the Membership Confirmation Message” on page 278
- “Default Settings for Downloads” on page 278
- “Sources” on page 280
- “Member Profiling” on page 282
- “Additional Links” on page 284
- “Internet Merchant Account” on page 286
- “Publish the Membership Category” on page 287

The Publish the Membership Category screen summarizes your selections on the Web Membership Wizard.

► **Viewing the Publish the Membership Category screen**

1. From the Internet Merchant Account screen, click **Next**. The Publish the Membership Category screen appears.

NetSolutions - Web Membership Wizard

Publish the Membership Category
This step allows you to review what you have entered before publishing the membership category to the Web.

====Publish Membership Summary====
Membership Category Name: Adopt an Animal - Patron

Name: Adopt an Animal - Patron
Description: Saving one animal at a time.
Details: Your gift is tax deductible!
Image: Yes
Caption: Animals have rights too!
Display Tell a Friend link: Yes

Allow Join: Yes
Allow Renew: Yes
Membership fee required: Yes
Default Gift Amount: \$50.00
Allow subcategory: Yes
Allow gifts of membership: Yes

Sender email: dir@wwa.org

< Back Finish Cancel

2. Confirm the information is correct. If you need to change anything, click **Back**. If the information is correct, click **Finish**.

The membership category information is submitted to Blackbaud, and the Congratulations! screen appears with a link to the new membership Web page.

NetSolutions - Web Membership Wizard

Congratulations!
This Membership Category has been successfully published to the Web.

This membership page has now been published to the Web. The link below will launch your browser so you can see how your membership Web page looks.

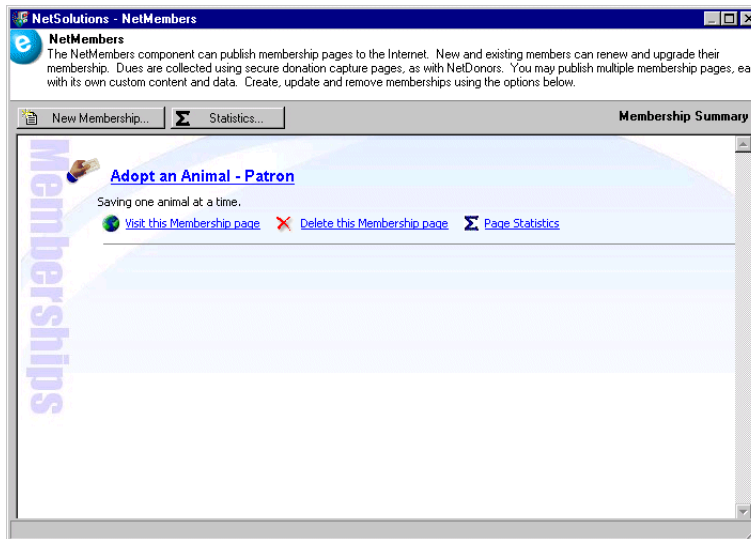
[Click here to visit the membership page](#)

To add a link to this NetSolutions page on your Web page, copy the HTML code below and paste it into the appropriate page on your site.

```
<!-- Code Supplied by Blackbaud Begins -->
<A
HREF='http://M-PTLR61-NS781/OPXREPHIL/MemberDetail.asp?cguid=6DF2B01A%2D5
631%2D4436%2DBF1D%2D677C76A0949C&mid=47'>Click here to visit the Adopt an Animal -
Patron page</A>
<!-- Code Supplied by Blackbaud Ends -->
```

< Back Finish Close

3. Click the **Click here to visit the membership page** link. The Web page you just designed appears.
4. To add the Web Membership Form to your existing Web site, cut and paste the code provided in the box beneath the **Click here to visit the directory page** link.
5. To exit the NetSolutions - Web Membership Wizard screen, click **Close**. You return to the NetSolutions - NetMembers screen.



The new online membership category appears as a link on the screen.

6. To add the membership page you just designed to your Web site, open **Configure and Customize** and select the Site Map/Links tab. Click the link under **Membership Opportunities**. The code necessary to add the page to their Web site appears. Paste this code to your Web site.
7. To exit the NetSolutions - Web Membership Wizard screen and return to the NetSolutions page, click the "X" in the upper, right corner.

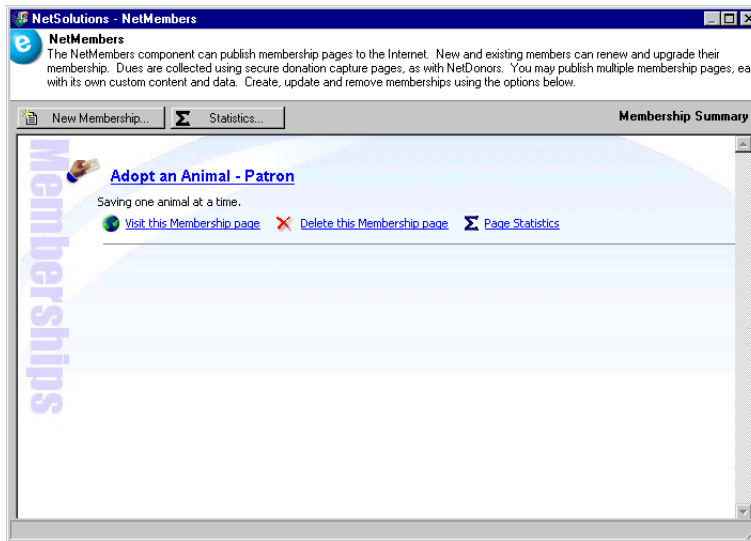
Viewing a Membership Web Page

After you create an online membership page, you can access and edit the page through *NetSolutions*.

► Viewing an online membership page

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

2. Click **NetMembers**. The NetSolutions - NetMembers screen appears.



3. Click the **Visit this membership page** link. The Web page appears.



4. To exit the Web page and return to NetSolutions - NetMembers screen, click the "X" in the upper right corner.

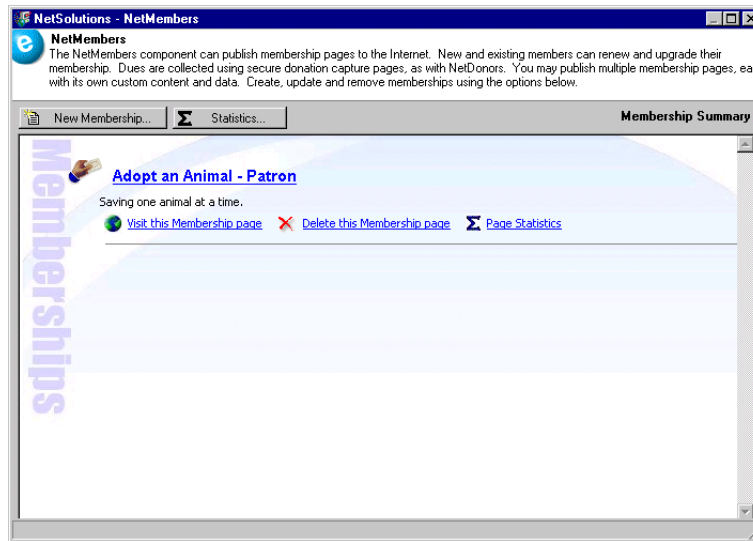
Deleting a Membership Web Page

Once an online membership page has served its purpose, you can permanently remove it from your Web site.

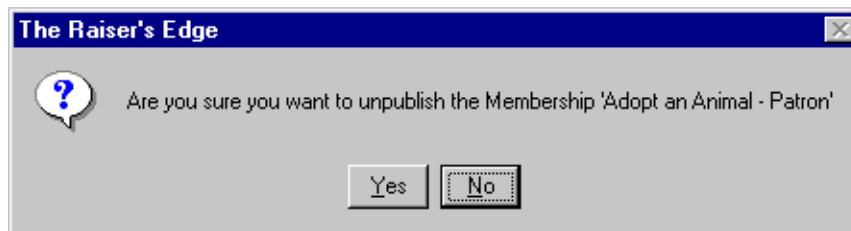
► Deleting an online membership page

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

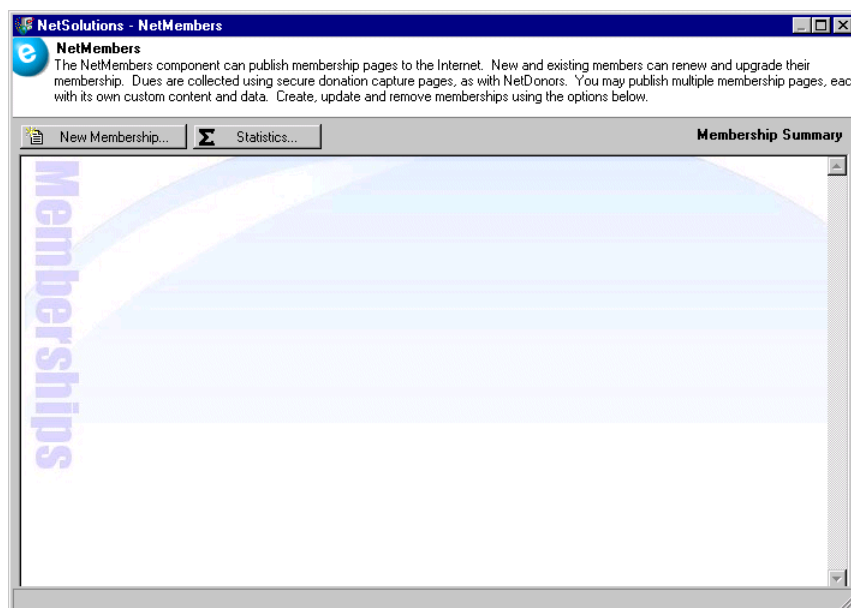
2. Click **NetMembers**. The NetSolutions - NetMembers screen appears.



3. Under the Web page link to delete, click **Delete this Membership page**. A warning message appears.



4. Click **Yes**. The NetSolutions - NetMembers screen appears, minus the deleted membership Web page.



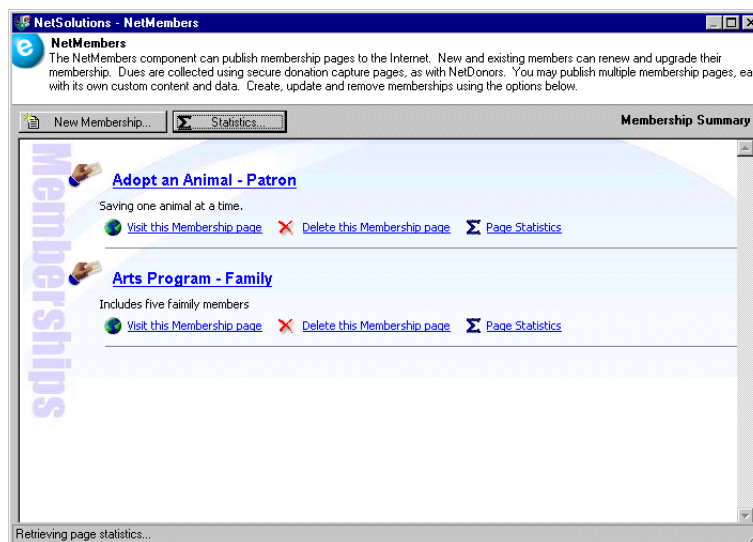
5. To exit this screen and return to the NetSolutions page, click the "X" in the upper right corner.

Viewing Membership Page Statistics

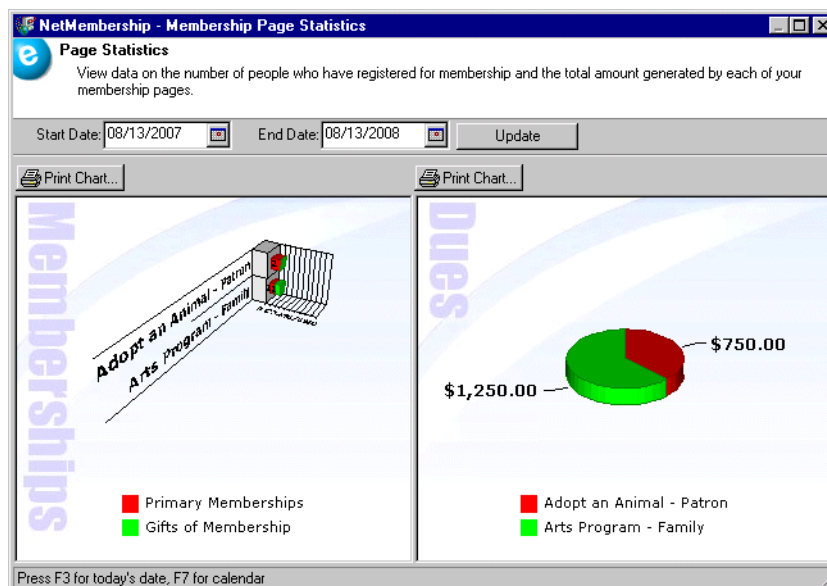
NetSolutions keeps track of how many times your online membership pages are visited and how much money each page generates. Through the **Statistics** button on the NetSolutions - NetMembers screen, you can view and print charts tracking this information. You can view statistics for all membership pages or for one page.

► Viewing membership page statistics

1. On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **NetMembers**. The NetSolutions - NetMembers screen appears.

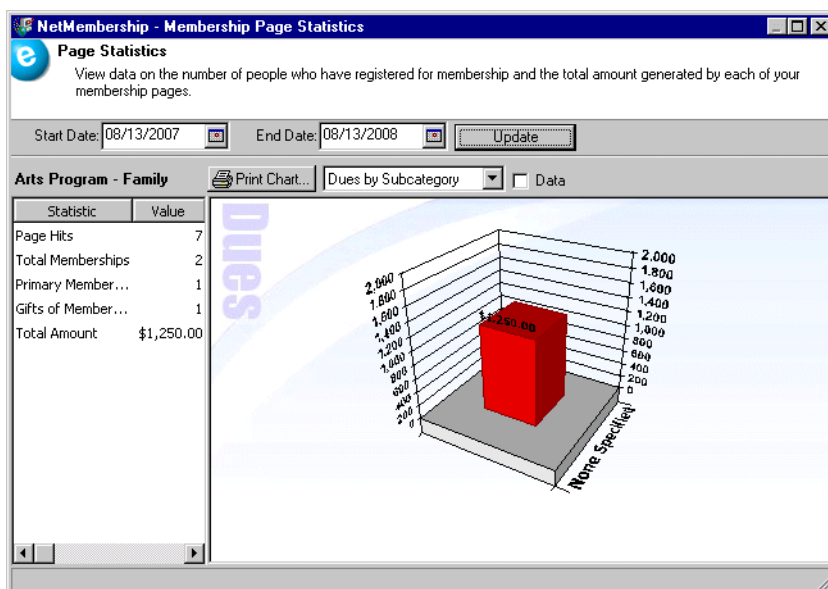


3. To view a statistical overview of traffic and membership fees generated on all your membership pages, click the **Statistics** button. The Membership Page Statistics screen appears.

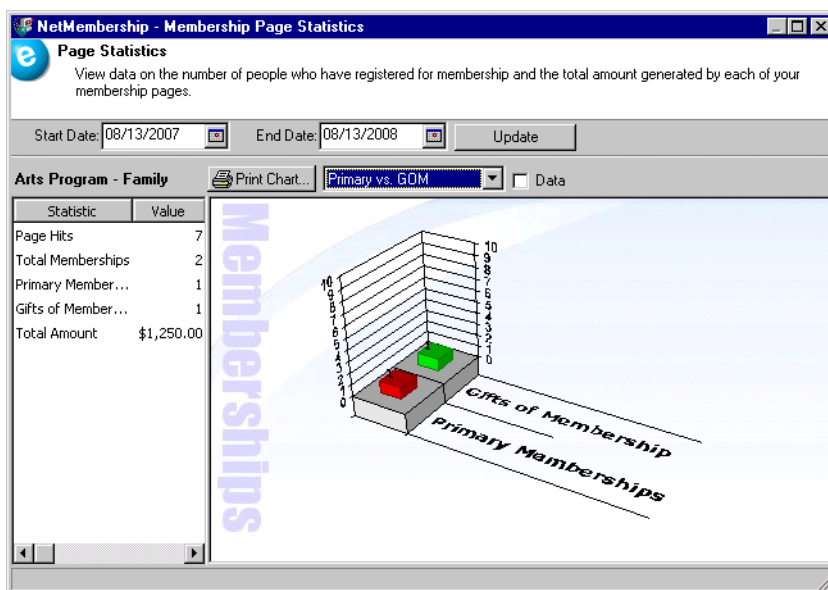


- On the left side of the screen, Memberships, you can see how many memberships were generated on each page. In the preceding example, the Adopt an Animal page generated two memberships and the Arts Program generated 1.

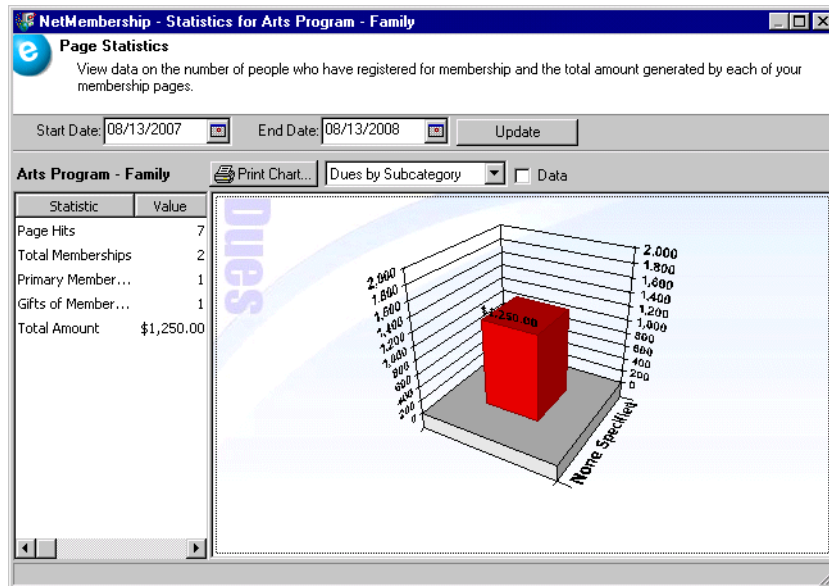
- On the right side of the screen, Dues, you can see how much money each page generated. In the preceding example, the Adopt an Animal page generated \$750 and the Arts Program page generated \$1,250.
 - To see statistics for a specific period, enter a **Start Date** and **End Date**, and click **Update**.
 - Click **Print Chart** above each graph to print the graph.
4. To view statistics for a specific page, from the NetMembers page, click the **Page Statistics** link included below the membership page link. The Statistics screen appears.



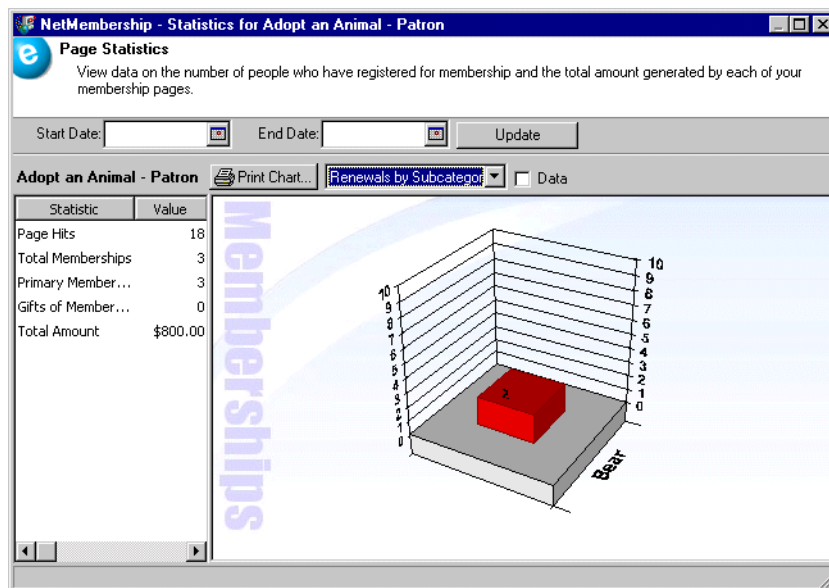
- To see statistics for a specific period, enter a **Start Date** and **End Date**, and click **Update**.
- Click **Print Chart** above the graph to print the statistic information.
- In the drop-down field above the chart, you can select to view the following graphs:
Primary vs. GOM (Gift of membership)



Dues by Subcategory



Renewals by Subcategory



- If you mark the **Data** checkbox, the graphic is replaced by columns.
 - The left side displays the number of Page Hits, Total Memberships, Primary Memberships, Gift of Memberships, and Total Amount generated from the membership page.
5. To close the screen and return to the NetSolutions - NetMembers screen, click the "X" in the upper right corner.

Downloading Transactions



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The **Download Transactions** link allows you to download all information entered on your *NetSolutions* Web pages. The online information is organized based on the Web page on which it was added.

Note: *The Raiser's Edge* encrypts credit card numbers entered in your database. If someone attempts to access your database through the back end, the credit card data will appear illegible. Data displayed in the front end, or user interface, depends on the security settings you establish for credit card numbers and the user's security rights. For more information about setting security in *The Raiser's Edge*, see the Security chapter in the *Configuration & Security Guide*.

For example, if someone enters information on your **NetEvents** Web page, that information is accessed through the link under **Special Event Registrations**; if someone enters information on your **NetDonors** Web page, that information is accessed through the link under **Donations**; and if someone completes the online constituent registration form but does not register for an event or make a donation, that information is accessed through the link under **Constituent Registrations**.

Accessing Downloaded Transactions

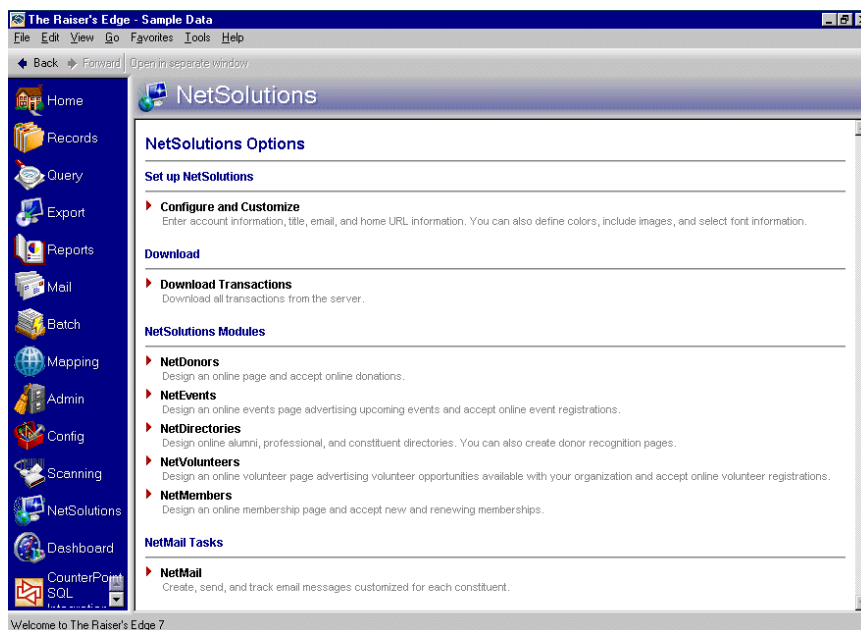
You can download information from your *NetSolutions* Web pages at any time. The links provided on the Download Transactions screen import all information and organize it based on the Web page from which it originates.

Note: Criteria for handling duplicate individuals and corporations can be modified in *The Raiser's Edge* by changing the settings in **Configuration, Business Rules, Duplicates**.

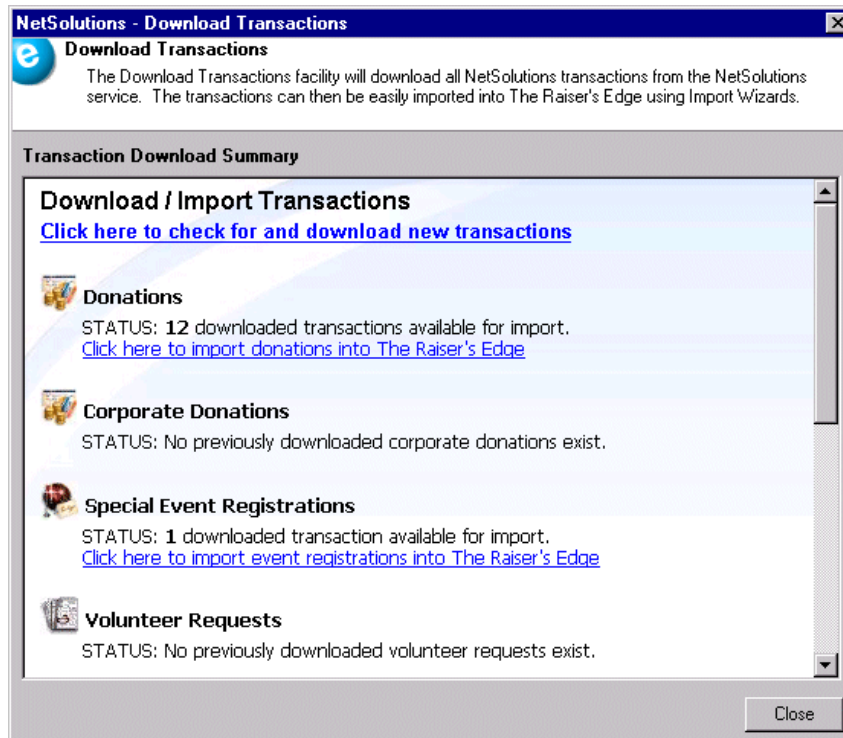
When you download your transactions *NetSolutions* will attempt to match registrant information to existing constituents in your *Raiser's Edge* database. If duplicate individuals or corporations exist, *NetSolutions* will automatically complete the appropriate information in the required fields for import into *The Raiser's Edge*.

► Accessing transactions from your NetSolutions Web pages

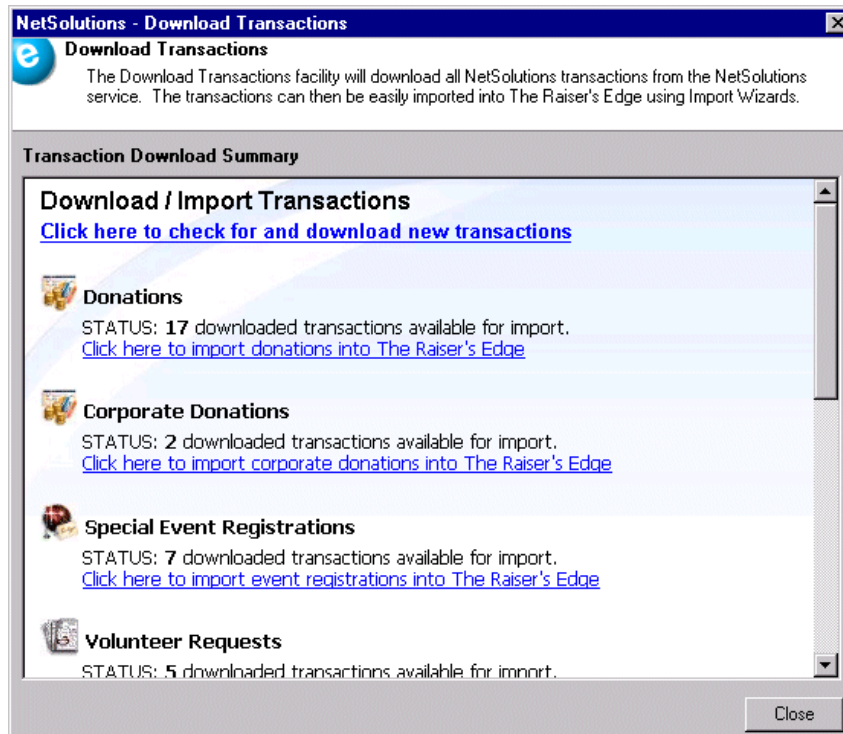
1. On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.



2. Click **Download Transactions**. The Download Transactions screen appears.



3. Click the **Click Here to check for and download new transactions** link. A screen appears, displaying the number of transactions downloaded.
4. Click **OK**. All online transactions appear.



Note: The program does not overwrite downloaded transactions.

- Information downloaded from your **NetDonors** Web pages appears either under **Donations** or **Corporate Donations**. If the donor marked the **This donation is on behalf of a corporation** when donating online, the gift appears under **Corporate Donations**, otherwise, the gift appears under **Donations**. For detailed instructions about entering **Donations** information into *The Raiser's Edge*, see "Downloading Information from Your Donation Pages" on page 299; for information about entering **Corporate Donations** information into *The Raiser's Edge*, see "Corporate Donations" on page 305.
- Information downloaded from your **NetEvents** Web pages appears under **Special Event Registrations**. For detailed instructions about entering this information into *The Raiser's Edge*, see "Downloading Information from Your Event Web Pages" on page 319.
- Information downloaded from your **NetVolunteers** Web pages appears under **Volunteer Requests**. For detailed instructions about entering this information into *The Raiser's Edge*, see "Downloading Information from Your Job Web Pages" on page 324.
- Information downloaded from your **NetMembers** Web pages appears under **Memberships**. For detailed instructions about entering this information into *The Raiser's Edge*, see "Downloading Information from Your Membership Web Pages" on page 329.
- Information downloaded from your *Capwiz* advocacy Web site, appears under **Advocacy**. For detailed instructions about entering this information into *The Raiser's Edge*, see "Downloading Advocacy Information" on page 337.
- Information downloaded from your constituent online registration page appears under **Constituent Registration**. For detailed instructions about entering this information into *The Raiser's Edge*, see "Downloading Constituent Registration Information" on page 341.
- Information downloaded from your online change of address form appears under **Change of Address Requests**. For detailed instructions about entering this information into *The Raiser's Edge*, see "Downloading Change of Address Information" on page 346.
- Email opt-out information downloaded from your *NetSolutions* Web pages appears under **Email "Opt-Outs"**. For detailed instructions about entering this information into *The Raiser's Edge*, see "Downloading Email Opt-Out Information from your Web Site" on page 352.
- Undeliverable email information downloaded from the Blackbaud server appears under **Undeliverable Email**. For detailed instructions about creating a query with this information, see "Downloading Undeliverable Email Address Information" on page 355.

5. To exit the Download Transactions screen and return to the *NetSolutions* page, click **Close**.

Downloading Information from Your Donation Pages

You can download donation information, including tributes, entered on your **NetDonors** Web pages using the **Download Transactions** link in *NetSolutions*.

Note: *The Raiser's Edge* encrypts credit card numbers entered in your database. If someone attempts to access your database through the back end, the credit card data will appear illegible. Data displayed in the front end, or user interface, depends on the security settings you establish for credit card numbers and the user's security rights. For more information about setting security in *The Raiser's Edge*, see the Security chapter in the *Configuration & Security Guide*.

Once downloaded, you can generate a batch file. The batch file allows you to commit all downloaded information to *The Raiser's Edge*. However, before creating the batch file, you must match downloaded constituent information with records in your *Raiser's Edge* database. If a record does not exist, you must create one.

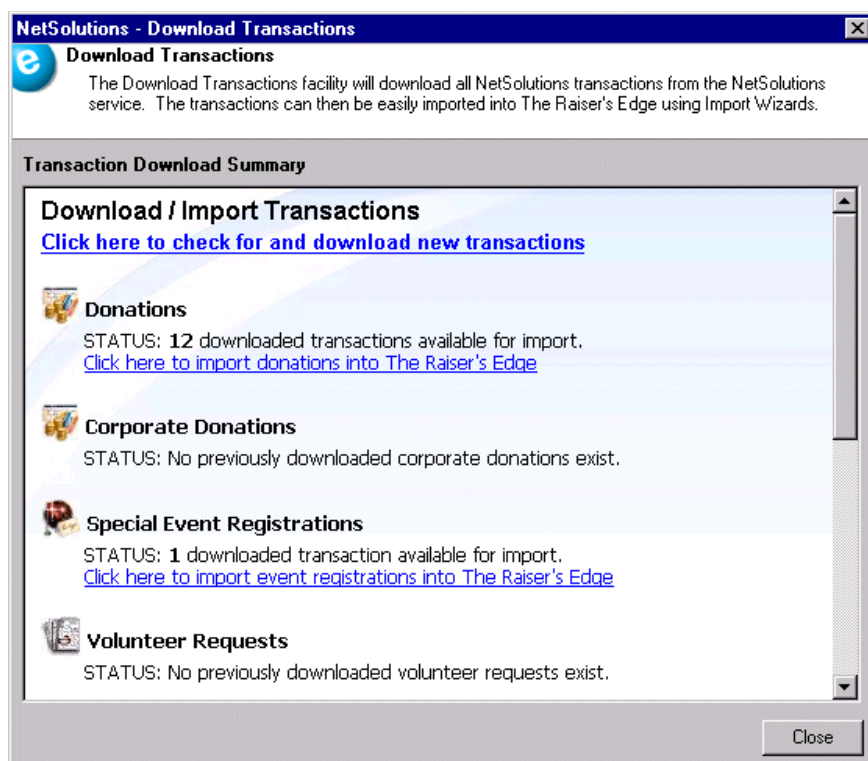
Individual Donations

If the online donor does not mark **This donation is on behalf of a corporation** when donating online, the gift is assumed to be from an individual and appears under **Donations** on the Download Transactions screen. The donation must be matched to an individual constituent record in your database. If the record does not exist, you must create one.

For information about downloading corporate donations, see “Corporate Donations” on page 305.

► Downloading individual donations

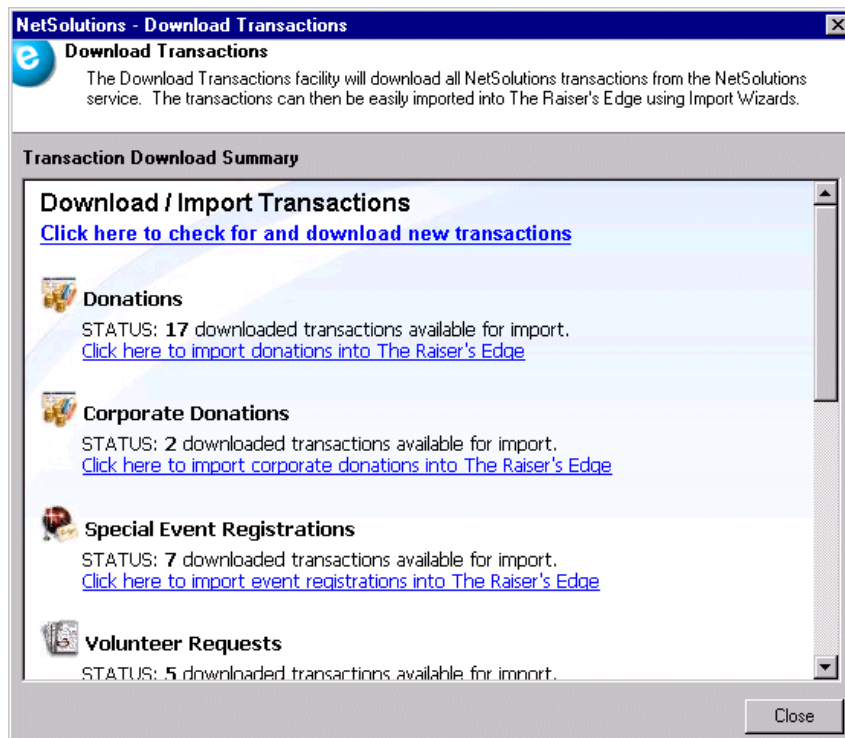
1. On the Raiser’s Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **Download Transactions**. The Download Transactions screen appears.



Note: NetSolutions downloads up to a maximum of 1,000 online transactions at a time. If, after downloading transactions, the **Status** fields on the Transaction Download Summary screen add up to 1,000 transactions, you may want to click the **Click here to check for and download new transactions** link a second time, to make sure you download all online data.

3. Click the **Click here to check for and download new transactions** link. A screen appears, displaying the number of transactions downloaded.

4. Click **OK**. The Download Transactions screen appears.



Links to the downloaded transactions appear. The information on this screen is arranged based on the Web page from which the transactions were downloaded.

Note: The program does not overwrite downloaded transactions.

For instance, in the previous example, 17 donations appear under **Donations**. These were downloaded from the **NetDonors** Web page. Seven event registrations appear under **Special Event Registrations**. These were downloaded from the **NetEvents** Web page.

Note: *The Raiser's Edge* keeps a record of the batch links. Consequently, you do not have to repeat steps 6-9 for subsequent donations made by the same constituent.

5. To import the donations into *The Raiser's Edge*, under **Donations**, click the **Click here to import donations into The Raiser's Edge** link. The Import Donations Wizard screen appears, displaying all the information downloaded from your **NetDonors** Web page.

RE Constituent	Tribute	Donor Information	Gift information	RE Constit Bank	Payment inform
		Ms. Linda Kennedy 4444 South Park Poland, OH 44514 United States Phone: (330) 777-0... Email: lkennedy@a... Send email: Yes	\$100.00 07/15/2008 Cash	Credit Card	Linda Kennedy MasterCard 4444 4444 4444 4 08/09
		Ms. Linda Kennedy 444 South Park Poland, OH 44514 United States Phone: (330) 777-0... Email: lkennedy@a... Send email: Yes	\$400.00 07/15/2008 Cash	Credit Card	Linda Kennedy MasterCard 4444 4444 4444 4 08/09

Enter the batch number to create or leave blank to use next available: 222222

Create Batch Cancel

Note: You can create a batch of linked transactions even if there are other transactions unlinked. For example, if you have 300 donations downloaded, link the first 50 and create a batch leaving the other 250 in the grid to link at a later date.

6. Before using *Batch* to enter the information into *The Raiser's Edge*, you must match the donor with an individual constituent record in your database, using the **RE Constituent** column. If the constituent record does not exist, you must create one. Place your cursor in the **RE Constituent** column next to the donor to enter. Press **F8** on your keyboard to create a constituent record in *The Raiser's Edge*, based on the information downloaded from *NetSolutions*.

Note: If the constituent information defaults into the **RE Constituent** column when you open the Import Donation Wizard screen, the program has remembered the constituent from a previous download. You do not have to match them again with a *Raiser's Edge* constituent record.

- To match the donor with an individual constituent record in your database, place your cursor in the **RE Constituent** column next to the donor to enter. Press **F7** on your keyboard. The Open screen appears.

The donor's name defaults into the name fields at the bottom of the screen.

- If a constituent record already exists, the donor's name appears in the **Constituent Name** grid. Select the name and click **Open**.
- If the name does not already exist, click **Add New** to add the record. You must then identify the new record as "Individual", and the New Individual screen appears.

Warning: Use caution when matching donors with constituent records. Make sure the donor is the constituent to whom you are linking the online donation.

All information included in the donor's online record defaults into the new constituent record. Click **Save and Close** or add additional information. For more information about adding a constituent record, see the *Constituent Data Entry Guide*.

Click **Save and Close**. You return to the Import Donations Wizard screen.

NetSolutions - Import Donations Wizard

Import Donations
Link downloaded transactions to Raiser's Edge records in this step.

RE Constituent	Tribute	Donor Information	Gift information	RE Constit Bank	Payment inform
Linda Kennedy 4444 South Park Poland, OH 44514 Constit ID: 218		Ms. Linda Kennedy 4444 South Park Poland, OH 44514 United States Phone: (330) 777-0... Email: lkennedy@a... Send email: Yes	\$100.00 07/15/2008 Cash	Credit Card	Linda Kennedy MasterCard 4444 4444 4444 4 08/09
		Ms. Linda Kennedy 444 South Park Poland, OH 44514 United States Phone: (330) 777-0... Email: lkennedy@a... Send email: Yes	\$400.00 07/15/2008 Cash	Credit Card	Linda Kennedy MasterCard 4444 4444 4444 4 08/09

Enter the batch number to create or leave blank to use next available: 222222

Create Batch Cancel

Press F7 to search for an individual contact

The Donor information now appears in the **RE Constituent** column.

8. If you accept recurring direct debit gifts online, you must also match each online recurring direct debit gift with a bank record in your database. For detailed instructions, see "Recurring Direct Debit Gifts" on page 312.
9. If you accept tribute gifts online, you must also match each online honor/memorial gift with a tribute record in your database. For detailed instructions, see "Tribute Gifts" on page 314.
10. In the **Enter the batch number to create or leave blank to use next available** field, enter the number to assign the batch file created with the downloaded information. To use the next number available in *Batch*, leave this field blank.
11. After you match the downloaded information with records in *The Raiser's Edge*, click **Create Batch**. The program generates a batch entry, and a screen appears displaying the batch number.

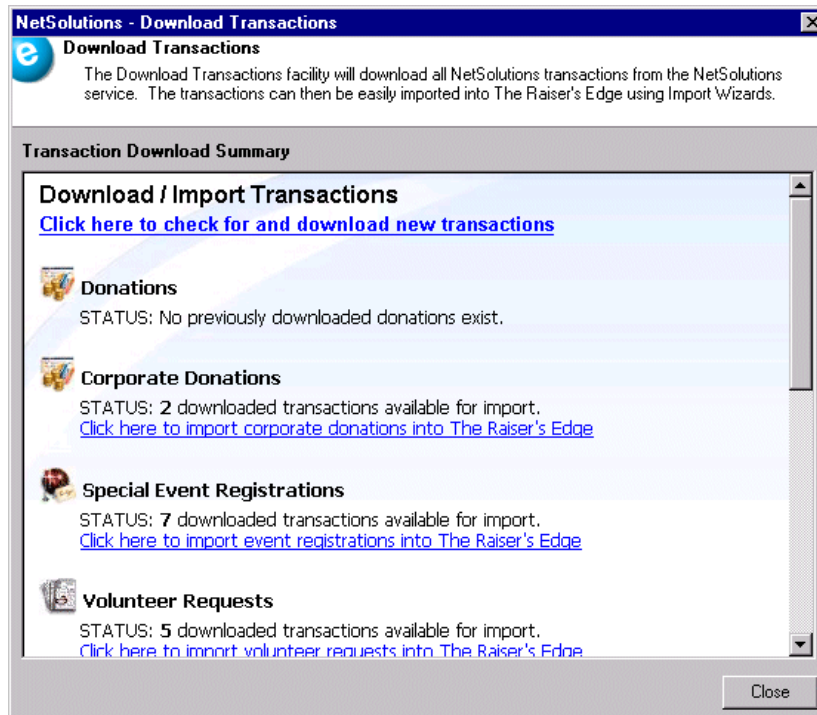
The Raiser's Edge

Donations have been placed in Batch #29.

OK

12. Click **OK**. The Import Donations Wizard screen appears with no donor information.

13. To return to the Download Transactions screen, click **Close**.



You are now ready to open *Batch* and commit the donor information to **The Raiser's Edge**. For information on committing batch entries, see the *Batch Guide*.

14. To return to the NetSolutions page, click **Close**.

Corporate Donations

If you marked **Allow corporate donations** on the Miscellaneous screen in **NetDonors**, you agreed to accept online donations on behalf of companies. You download these donations, using the link under **Corporate Donations** on the Download Transactions screen.

Note: If the donor did not mark the **This donation is on behalf of a corporation** checkbox when donating online, the gift appears under **Donations**.

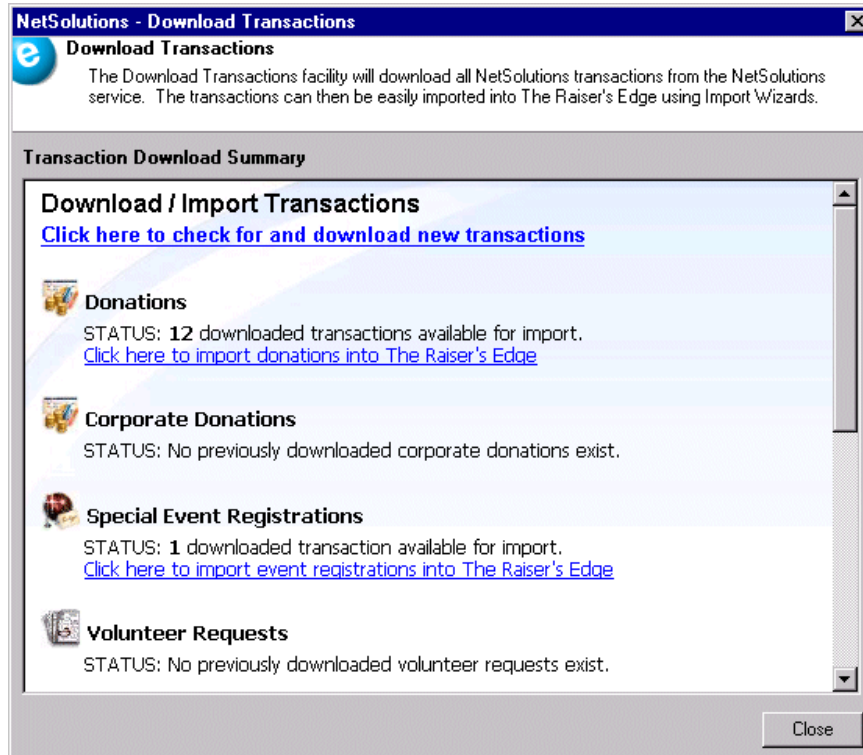
Once downloaded, you can generate a batch file. The batch file allows you to commit all the downloaded information to **The Raiser's Edge**. However, before creating the batch file, you must complete the following steps:

- Link the downloaded organization contact information with an individual constituent record in your **Raiser's Edge** database. If a record does not exist, you must create one.
- Link the downloaded organization information to the organization contact record in your **The Raiser's Edge** database. If the link does exist, you must create one; if the donating organization does not have a constituent record, you must create one.
- If you allow recurring direct debit gifts online, you must link any such donations with bank/financial institution records in your **Raiser's Edge** database. If the record does not exist, you must create one.

► Downloading corporate donations

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

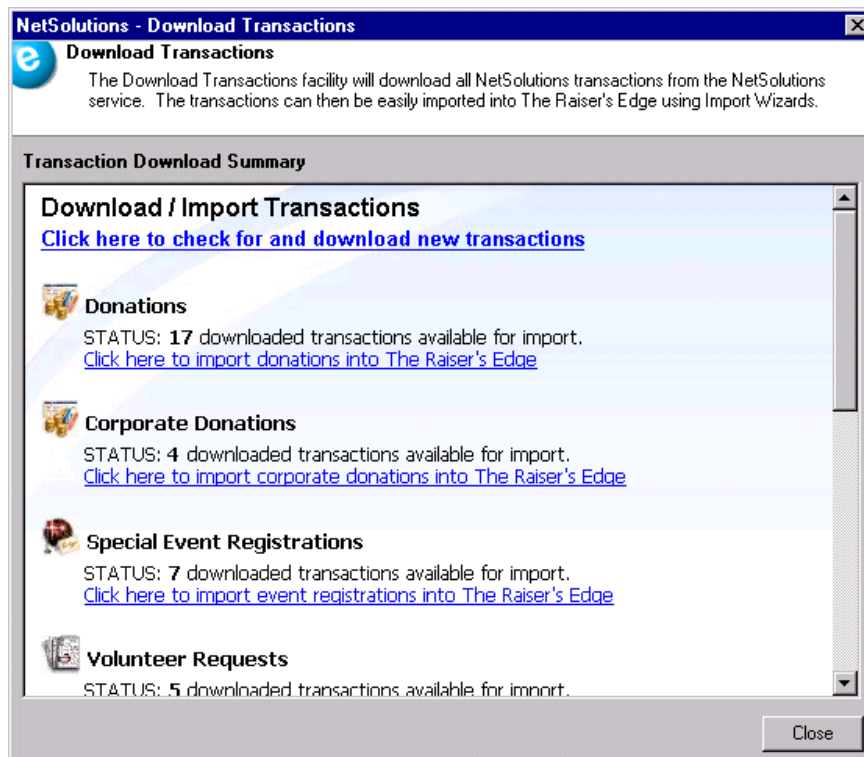
2. Click **Download Transactions**. The Download Transactions screen appears.



Note: *NetSolutions* downloads up to a maximum of 1,000 online transactions at a time. If, after downloading transactions, the **Status** fields on the Transaction Download Summary screen add up to 1,000 transactions, you may want to click the **Click here to check for and download new transactions** link a second time, to make sure you download all online data.

3. Click the **Click here to check for and download new transactions** link. A screen appears, displaying the number of transactions downloaded.

4. Click **OK**. The Download Transactions screen appears.



Links to the downloaded transactions appear. The information on this screen is arranged based on the Web page from which the transactions were downloaded.

Note: The program does not overwrite downloaded transactions.

For instance, in the previous example, four donations appear under **Corporate Donations**. These were downloaded from the **NetDonors** Web page. Seven event registrations appears under **Special Event Registrations**. These were downloaded from the **NetEvents** Web page.

Note: *The Raiser's Edge* keeps a record of the batch links. Consequently, you do not have to repeat steps 6-9 for subsequent donations made by the same constituent.

- To import the donations into *The Raiser's Edge*, under **Corporate Donations**, click the **Click here to import corporate donations into The Raiser's Edge** link. The Import Donations Wizard screen appears, displaying all the corporate donation information downloaded from your **NetDonors** Web page.

NetSolutions - Import Donations Wizard

Import Donations
Link downloaded transactions to Raiser's Edge records in this step.

RE Contact	Tribute	Contact Information	RE Constituent	Donor Information	Gift information
		Franklin 444 South Main Charleston, SC 29401 United States Email: Bfranklin@aol.... Send email: Yes		Ben Franklin Inc.	\$20,000.00 08/18/2008 Cash
		Smith 098 Water St. Poland, OH 44153 United States Email: vaugh@aol.com Send email: Yes		ABC Plumbin	\$5,000.00 08/18/2008 Cash
Linda Kennedy		Ms. Linda Kennedy 444 South Main		Parker Company	\$100.00 08/18/2008

Enter the batch number to create or leave blank to use next available:

Press F7 to search for an individual contact or F8 to add a new constituent

Create Batch Cancel

Note: You can create a batch of the linked transactions even if there are other transactions unlinked. For example, if you have 300 donations downloaded, link the first 50 and create a batch leaving the other 250 in the grid to link at a later date.

- When a corporation makes an online donation, the donor must enter at least the last name of an individual associated with the company. This is the company's contact. When you download this information, you must link this organization contact with an individual constituent record in your database. If the constituent record does not exist, you must create one. Press **F8** on your keyboard to create a constituent record in *The Raiser's Edge*, based on the information downloaded from *NetSolutions*.
- If the constituent does exist, or you would like to search for one manually, place your cursor in the **RE Contact** column next to the gift to enter. Press **F7** on your keyboard. The Open screen appears.

Open

Find: Individual Search using query: <Default>

Individual	Address Block	City, State	Constituent ID
Frank Philips	334 South Windamer...	Houston, TX	232

Find Individuals that meet these criteria:

Last Name: Philips First Name: Frank

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

Address lines: City: State: ZIP: Class of: Credit card no.:

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

☐ Display deceased constituents ☐ Check aliases

Open Cancel Add New Options Find Now New Search Previous Search Expand Results

The contact's name defaults in the name fields at the bottom of the screen.

- If an individual constituent record already exists for the contact, the contact's name appears in the **Individual** column. Select the name and click **Open**. You return to the Import Donations Wizard screen.
- If the individual record does not already exist, click **Add New** to add the record. The New Individual screen appears.

All contact information included in the online record defaults into the new individual constituent record. Click **Save and Close** or add additional information. For more information about adding a constituent record, see the *Constituent Data Entry Guide*.

When you click **Save and Close**, you return to the Import Donations Wizard screen.

RE Contact	Tribute	Contact Information	RE Constituent	Donor Information	Gift information
Linda Kennedy 4444 South P... Poland, OH ... Constit ID: 218		Ms. Linda Kennedy 444 South Park Poland, OH 44514 United States Phone: (330) 777-0987 Email: lkennedy@aol... Send email: Yes		Parker Company	\$100.00 08/18/2008 Recurring gift (Q. Endangered Anim.
Frank Philips 334 South Windamere Dr. Houston, TX 77098 Constit ID: 232		Mr. Frank Philips 334 South Windamere... Houston, TX 77098 United States Email: fphilips@mcont... Send email: Yes		Major Contracting	\$400.00 08/19/2008 Recurring gift (An

The contact information now appears in the **RE Contact** column.

8. Next, you must link the contact's individual constituent record to the donating organization and create an organization constituent record, if necessary. To do this, place your cursor in the **RE Constituent** column next to the gift to enter. Press **F7** on your keyboard. The Search relationships screen appears.

Search relationships for Ben Franklin

Find: Organization

Org Name	Relationship	Date From	Date To

Open Cancel Add New Find... Filters...

- If a relationship already exists in your database between the contact's individual constituent record and the donating organization's constituent record, the corporation's name appears in the **Org Name** column.
Select the name and click **Open** to confirm the link and return to the Import Donation Wizard screen.
- If a relationship does not exist, click **Add New**. The New Organization Relationship screen appears.

New Organization Relationship for Ben Franklin

File Edit View Relationship Help

Save and Close Undo Redo ?

General 1 General 2 Attributes/Notes

Org name: Ben Franklin Inc. Aliases

Country: United States More... Industry: Position: Print?

Address lines: 444 South Main Profession: Income: Relationship: Reciprocal: Date from: to

City: Charleston State: SC South Carolina ZIP: 29401 DPC: Print organization name with address

Phones/Email/Links	
Type	Number/Email Address

For this organization, this individual is a(n):

☐ Employee ☐ Primary business information
☐ Contact ☐ Do not mail to this contact

Contact type:

Press F7 for organization search, F8 for address validation

All information about the donating organization entered with the online donation defaults. You can add/edit information on this screen.

Because the organization must be a constituent in the database, from the menu bar, select **Relationship, Add this organization as a constituent**. The Raiser's Edge screen appears.

The Raiser's Edge dialog box has a title bar with a close button. Inside, a question mark icon is next to the text: "You have chosen to save Major Contracting as a constituent. Use these fields to assign a constituency to this constituent." Below this, there is a "Constituency:" label followed by a dropdown menu showing "Corporation\Business" and a "CO" button. Below that are "Date from:" and "Date to:" labels, each followed by a date picker button. At the bottom are "OK" and "Cancel" buttons.

Enter a **Constituency** for this organization record. A constituency defines the relationship a constituent has with your organization. In other words, it tells you why the individual is in your database. Examples of constituencies are Board Member, Alumnus, Trustee, Current Parent, and Friend. Each constituent record in your database should have at least one constituency listed. If you list more than one, always list the most important active constituency first. **The Raiser's Edge** recognizes the first constituency listed as primary.

If the constituency you select expires, enter the **Date from** and **Date to**. For example, today is April 4, 2008. The **Constituency** you selected is Member, and your memberships are good for one year. You would enter 04/04/2008 in the **Date From** field and 04/04/2009 in the **Date to** field. If the **Constituency** does not expire, do not complete the **Date to** and **Date from** fields.

Click **OK**. You return to the New Organization Relationship screen.

Click **Save and Close**. A screen appears asking to reciprocate the new organization record with the contact record.

The Raiser's Edge dialog box has a title bar with a close button. Inside, a question mark icon is next to the text: "Major Contracting is a constituent. Do you wish to reciprocate Frank Philips as a relationship for Major Contracting?" Below this are three buttons: "Yes", "No", and "Cancel".

Click **Yes**. You return to the Import Donation Wizard screen. The new organization information appears in the **RE Constituent** column.

NetSolutions - Import Donations Wizard
 Import Donations
 Link downloaded transactions to Raiser's Edge records in this step.

RE Contact	Tribute	Contact Information	RE Constituent	Donor Information	Gift information
Linda Kennedy 4444 South P... Poland, OH ... Constit ID: 218		Ms. Linda Kennedy 444 South Park Poland, OH 44514 United States Phone: (330) 777-0987 Email: lkennedy@aol... Send email: Yes		Parker Company	\$100.00 08/18/2008 Recurring gift (Q... Endangered Anim...
Frank Philips 334 South Wi... Houston, TX ... Constit ID: 232		Mr. Frank Philips 334 South Windamere... Houston, TX 77098 United States Email: fphilips@mcont... Send email: Yes	334 South Windamere Dr. Houston, TX 77098 Constit ID: 233	Major Contracting	\$400.00 08/19/2008 Recurring gift (An...

Enter the batch number to create or leave blank to use next available: 222222

Press F7 to search for a donor organization

9. If you accept recurring direct debit gifts online, you must also match each online recurring direct debit gift with a bank record in your database. For detailed instructions, see “Recurring Direct Debit Gifts” on page 312.
10. If you accept tribute gifts online, you must also match each online tribute gift with a tribute record in your database. For detailed instructions, see “Tribute Gifts” on page 314.
11. In the **Enter the batch number to create or leave blank to use next available** field, enter the number to assign the batch file created with the downloaded information. To use the next number available in *Batch*, leave this field blank.
12. After you match the downloaded information with records in your database, click **Create Batch**. The program generates a batch entry, and a screen appears displaying the batch number.



13. Click **OK**. The Import Donations Wizard screen appears with no donor information.
14. To return to the Download Transactions screen, click **Close**.
You are now ready to open *Batch* and commit the donor information to **The Raiser's Edge**. For information on committing batch entries, see the *Batch Guide*.
15. To return to the NetSolutions page, click **Close**.

Recurring Direct Debit Gifts

Note: To mark the **EFT?** field when downloading recurring gifts from NetSolutions, add the **EFT?** field to the *Batch Setup* once the gifts have been downloaded.

If you marked **Recurring direct debit gifts** on the Gift Types screen in **NetDonors**, you agreed to accept recurring gifts from donors using their bank debit card. The **Gift Information** column on the Import Donation Wizard screen displays the type of gift. If you download any recurring direct debit gifts, you must match the bank card with a bank record in your database. If the record does not exist, you must create one.

► Downloading recurring direct debit gifts

1. To match an online recurring direct debit gift with a bank record in your database, place your cursor in the **RE Constit Bank** column next to the donor to enter.

2. Press **F7** on your keyboard. The Search Relationships screen appears.

Any existing bank records for the constituent appear in the grid.

3. To use an existing bank record, select the record and click **Open**.

Note: For information about completing the New Bank/Financial Institution screen, see the *Constituent Data Entry Guide*.

If the record does not already exist, click **Add New**. The New Bank/Financial Institution screen appears.

All information included in the donor's online record defaults into the new bank/financial Institution record. Click **Save and Close** or add additional information.

Note: You can create a batch of the linked transactions even if there are other transactions unlinked. For example, if you have 300 donations downloaded, link the first 50 and create a batch leaving the other 250 in the grid to link at a later date.

- When you click **Save and Close**, you return to the Import Donations Wizard screen.

RE Constituent	Tribute	Donor Information	Gift information	RE Constit Bank	Payment inform
Frank Ellis 343 Canty Lane Houston, TX ... Constit ID: 224		Mr Frank Ellis 343 Canty Lane Houston, TX 77098 United States Email: fphilps@mcont- Send email: Yes	\$150.00 03/17/2008 Pledge		
Linda Kennedy 4444 South Park Poland, OH 44514 Constit ID: 218		Ms. Linda Kennedy 444 South Park Poland, OH 44514 United States Phone: (330) 777-0... Email: lkennedy@a... Send email: Yes	\$50.00 07/21/2008 Recurring gift (An... Endangered Animals	Bank of America 33333333 Puritest eeeeeeeeeeeeeeeeee eeee Checking	Bank of America 33333333 eeeeeeeeeeeeeeeeee Checking Linda Kennedy
Fred Flintstone		Mr. Fred Flintstone	\$100.00	Credit Card	Fredrick Flintstone

Enter the batch number to create or leave blank to use next available: 222222

Press F7 to search for a bank

The constituent bank information you just selected/created appears in the **RE Constit Bank** column.

- Return to the “Downloading individual donations” on page 300 or “Downloading corporate donations” on page 305 to complete the download process.

Tribute Gifts

If, when creating your online donation page in **NetDonors**, you marked the **Allow donors to enter honor/memorial information** checkbox, any tribute information entered on the donation page downloads along with the donation. If the online donor gives a tribute gift, you must match the gift with a tribute record in your database. If the record does not exist, you must create one. The **Tribute** column on the Import Donation Wizard screen displays any downloaded tribute gifts. If <Not Linked> appears in the column, you must link the gift.

► Downloading tributes

- From the Import Donation Wizard screen, identify any downloaded tribute gifts.

RE Constituent	Tribute	Donor Information	Gift information	RE Constit Bank	Payment informatic
Linda Kennedy 4444 South Park Poland, OH 44514 Constit ID: 218	<Not Lin...	Ms. Linda Kennedy 444 South Park Poland, OH 44514 United States Phone: (330) 777-0... Email: lkennedy@a... Send email: Yes	\$5,000.00 08/18/2008 Cash Rescue Mission Source: Visiting ...	Credit Card	Linda Kennedy MasterCard 4444 4444 4444 4444 08/09
Linda Kennedy 4444 South Park Poland, OH 44514 Constit ID: 218	<Not Lin...	Ms. Linda Kennedy 444 South Park Poland, OH 44514 United States Phone: (330) 777-0... Email: lkennedy@a... Send email: Yes	\$725.00 08/18/2008 Pledge Rescue Mission Source: Visiting ...		

Enter the batch number to create or leave blank to use next available: 222222

Press F7 to search for an individual contact or F8 to add a new constituent

If the donation is a tribute and not linked to a tribute record in your database, <Not Linked> appears in the **Tribute** column. You must then link the tribute to a tribute record.

Note: If the constituent and/or tribute information defaults into the **RE Constituent** and **Tribute** columns when you open the Import Event Registration Wizard screen, the program remembers the constituent/tribute from a previous download. You do not have to match them again with a constituent record.

2. To link tribute information to tribute record, on the Import Donation Wizard screen, place your cursor in the **Tribute** column. Press **F7** on your keyboard. The Link Donation Tribute Information screen appears.

Link Donation Tribute Information

1. Link the Donation to a Raiser's Edge Hon/Mem Record

Donation in Honor of: Bart Longfellow

RE Hon/Mem Record: [Redacted]

2. Select the Tribute: [Redacted]

Acknowledgees:

Acknowledgee Name	Address	City, State	Relationship

3. Add the Donation Acknowledgee

This donation specified an acknowledgee. If this acknowledgee does not appear in the above list, click "Add this Acknowledgee" to add it.

Bart Longfellow
123 Smith Lane
St. Louis, MO 44902
(216) 543-6543

☒ Add acknowledgee as a constituent

Add this Acknowledgee

OK Cancel

The **Donation in Honor of** field changes based on what the donor entered. For example, if the gift is in memory of an individual, the field reads **Donation in Memory of**. The honor/memorial name defaults into this field.

3. In the **RE Hon/Mem Record** field, click the binoculars. The Open screen appears.

The honor/memorial name defaults in the name fields at the bottom of the screen. If the honor/memorial has a record in your database, this name appears in the **Individual** grid.

4. Select the name and click **Open**.

If the name does not already exist in your database, click **Add New** to add the constituent record to your database. The New Individual screen appears displaying the Bio 1 tab.

- Select the Honor/Memorial tab.

- Make sure the **Constituent is an honor/memorial** checkbox is marked.
- Click **New Tribute**. The New Tribute screen appears.

New Tribute for Brad Ellis

File Edit Tribute Help

Save and Close

Tribute type: In Honor Of Date from: 08/18/2008

Description: Job Promotion Date to: 08/18/2009

Default Fund: 2009 Annual Fund

Notes:

Name	Relationship	Reciprocal	Letter
Fred Flintstone			General Thank You

☐ Honor/Memorial is an acknowledgee ☒ Gifts may be given to this tribute Gift Details

- Enter the tribute information. To link this tribute to your donor, you must mark **Gifts may be given to this tribute**. For information about completing this screen, see the *Tribute Data Entry Guide*.
- To return to the constituent record, click **Save and Close**.

Brad Ellis

File Edit View Constituent Letter Favorites Tools Help

Save and Close

Bio 1 Bio 2 Addresses Addressees/Salutations Appeals Notes Attributes

Media Honor/Memorial Volunteer Prospect

☒ Constituent is an honor/memorial New Tribute Open Delete...

Type	Description	Date From	Date To
In Honor Of	Job Promotion	08/18/2008	08/18/2009

Total number of gifts given to this tribute: 0
Total amount of gifts given to this tribute: \$0.00 Gifts

08/18/2008

- To return to the Link Donation Tribute Information screen, click **Save and Close**.

- Using the information you entered on the tribute record, the program automatically completes the **RE Hon/Mem Record** field. If the constituent has only one tribute record, the fields in step 2 of the Link Donation Tribute Information screen are also automatically completed. If there is more than one tribute, you must select the tribute in the **Select the Tribute** field.

Link Donation Tribute Information

1. Link the Donation to a Raiser's Edge Hon/Mem Record

Donation in Honor of: Bart Longfellow

RE Hon/Mem Record: Bart Longfellow

2. Select the Tribute: In Honor Of: Job promotion

Acknowledgees:

Acknowledgee Name	Address	City, State	Relationship
LeAnn Longfellow	123 Water...	Poland, OH	Wife

3. Add the Donation Acknowledgee

This donation specified an acknowledgee. If this acknowledgee does not appear in the above list, click "Add this Acknowledgee" to add it.

Bart Longfellow
123 Smith Lane
St. Louis, MO 44902
(216) 543-6543

☒ Add acknowledgee as a constituent

Add this Acknowledgee

OK Cancel

- If the donor entered acknowledgee information, it defaults in the box in the **Add the Donation Acknowledgee** frame. Although an acknowledgee does not have to be a constituent in your database, he must be listed as a relationship on the Relationships tab of the honoree's constituent record. If a relationship does not exist, the acknowledgee entered by the donor is not included in the **Acknowledgee** grid in step 2. If you would like to add the Acknowledgee as a constituent in *The Raiser's Edge*, mark the **Add acknowledgee as a constituent** checkbox.

Click **Add this Acknowledges** to include the new acknowledgee. The Link Tribute Acknowledgee screen appears.

Link Tribute Acknowledgee

Select an existing relationship record that matches this Acknowledgee, or choose "Add New" to add a new relationship to Bart Longfellow.

Individual Relationships for Bart Longfellow:

Relationship Name	Address	City, State	Relationship
Bart Longfellow			self
Mr. Mark Daniel Adamson, III	125 Smokerise Way	Charleston, SC	

Link Add New Cancel

- If the relationship record exists, select the record, and click **Link**. If the record does not exist, click **Add New**. The relationship is added, and you return to the Link Donation Tribute Information screen.
- Click **OK**. The Import Donations Wizard screen appears. The **Tribute** column is complete.

RE Constituent	Tribute	Donor Information	Gift information	RE Constit Bank	Payment ini
Linda Kennedy 4444 South Park Poland, OH 44514 Constit ID: 218	Bart Longfell... Constit ID: 195 In Honor Of Job promotion Acknowledg... 123 Smith L... C. L. Smith M.	Ms. Linda Kennedy 444 South Park Poland, OH 44514 United States Phone: (330) 777-0... Email: lkennedy@a... Send email: Yes	\$5,000.00 08/18/2008 Cash Rescue Mission Source: Visiting ...	Credit Card	Linda Kenned... MasterCard 4444 4444 44 08/09
Linda Kennedy 4444 South Park Poland, OH 44514 Constit ID: 218	<Not Linked>	Ms. Linda Kennedy 444 South Park Poland, OH 44514 United States Phone: (330) 777-0... Email: lkennedy@a... Send email: Yes	\$725.00 08/18/2008 Pledge Rescue Mission Source: Visiting ...		

Enter the batch number to create or leave blank to use next available: 222222

Create Batch Cancel

5. Return to the “Downloading individual donations” on page 300 or “Downloading corporate donations” on page 305 to complete the download process.

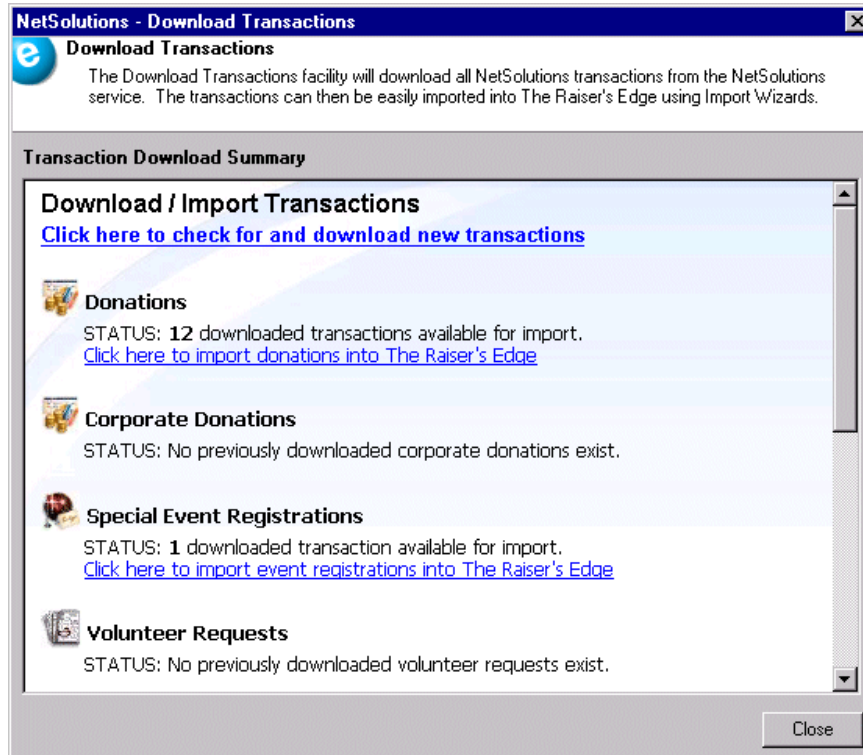
Downloading Information from Your Event Web Pages

You can download all online event registration information entered on your **NetEvents** Web pages, using the **Download Transactions** link in *NetSolutions*. Once downloaded, you can generate a batch file. With the batch file, you can commit all the downloaded information into **The Raiser's Edge**. However, before creating the batch file, you must match the downloaded information with constituent records in your **Raiser's Edge** database. If a constituent record does not exist, you must create one.

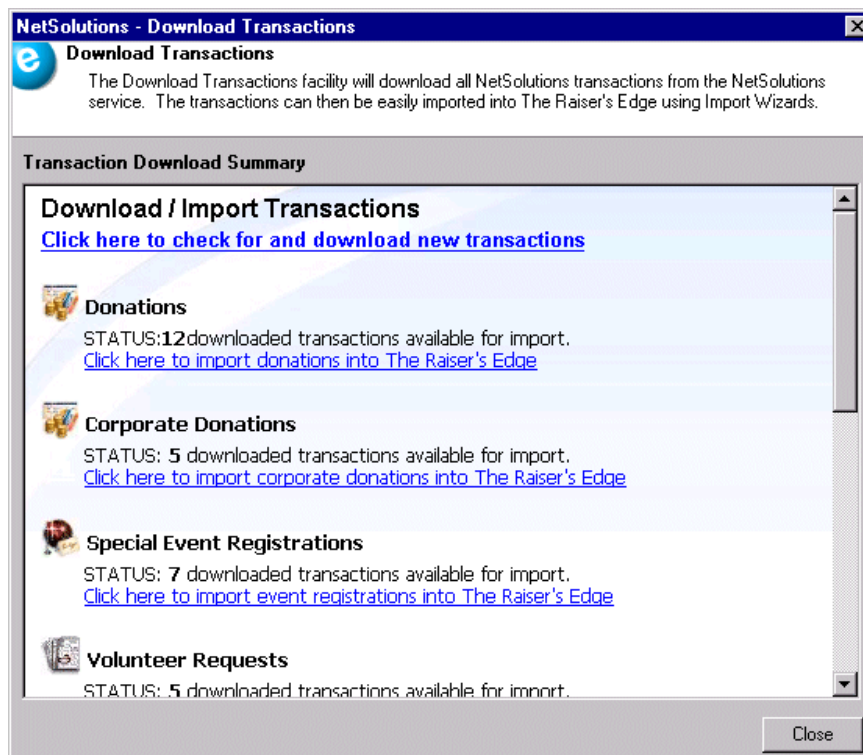
► Downloading event transactions

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

2. Click **Download Transactions**. The Download Transactions screen appears.



3. Click the **Click Here to check for and download new transactions** link. A screen appears, displaying the number of transactions downloaded.
4. Click **OK**. The Download Transactions screen appears.



Links to the downloaded transactions appears. The information is arranged based on the Web page from which the transactions were downloaded.

Note: The program does not overwrite downloaded transactions.

For instance, in the preceding example, seven event registrations were downloaded from the **NetEvents** Web page, and five corporate donations were downloaded from the **NetDonors** Web page.

Note: If the constituent information defaults into the **RE Constituent** column when you open the Import Event Registration Wizard screen, the program has remembered the constituent from a previous download. You do not have to match them again with a constituent record.

5. To import the event registrants into *The Raiser's Edge*, click the **Click here to import event registrations into The Raiser's Edge** link under **Special Event Registrations**. The Import Event Registrations Wizard screen appears.

RE Constituent	Event	Donor Information	Gift information	RE Constit Bank	Payment informa
Linda Kennedy 4444 South Park Poland, OH 44514 Constit ID: 218	Spring Ball	Ms. Linda Kennedy 444 South Park Poland, OH 44514 United States Phone: (330) 777-0... Email: lkennedy@a... Send email: Yes	\$40.00 08/07/2008 Cash Spring Ball 1 Couple	Credit Card	Linda Kennedy MasterCard 4444 4444 4444 44 08/09
	Spring Ball	Mr. Ben Franklin 444 Freedom Highway Phelidelphia, PA 123... United States Phone: (546) 987-0... Email: Bfranklin@a... Send email: Yes	\$1,000.00 08/07/2008 Cash Spring Ball 2 Corporate Spon...	Credit Card	Ben Franklin MasterCard 4444 4444 4444 44 08/09
Linda Kennedy	Spring Ball	Mr. Linda Kennedy	\$120.00	Credit Card	Linda Kennedy

Enter the batch number to create or leave blank to use next available: 222222

Create Batch Cancel

Note: You can create a batch of the linked transactions even if there are other transactions unlinked. For example, if you have 300 event registrations downloaded, link the first 50 and create a batch leaving the other 250 in the grid to link at a later date.

6. Before using *Batch* to enter the event information to *Raiser's Edge* records, you must match the registrant with a constituent record in your database, using the **RE Constituent** column. If the constituent record does not exist, you must create one. Place your cursor in the **RE Constituent** column next to the registrant to enter. Press **F8** on your keyboard to create a constituent record in *The Raiser's Edge*, based on the information downloaded from *NetSolutions*.

To match the registrant with a constituent record, place your cursor in the **RE Constituent** column next to the registrant to enter. Press **F7** on your keyboard. The Open screen appears.

Open

Find: Constituent Search using query: <Default>

Constituent Name	Address Block	City, State	Constituent ID
Ben Franklin	890 Broad St.	Charleston, SC	221

Find Constituents that meet these criteria:

Last/Org name: Franklin Address lines: City: State: ZIP: Class of: Credit card no.:
 First Name: Ben
 Constituent ID: SSN: Membership ID: Bank acct. no.:
☒ Display inactive constituents ☐ Check spouse name ☐ Exact match only ☐ Check nickname
☐ Display deceased constituents ☐ Check aliases ☐ Check contact name

Buttons: Open, Cancel, Add New, Options, Find Now, New Search, Previous Search, Expand Results

The registrant's name defaults into the name fields at the bottom of the screen.

- If a constituent record already exists, the registrant's name appears in the **Constituent Name** column. Select the name, and click **Open**. You return to the Import Event Registration Wizard screen.
- If the name does not already exist, click **Add New** to add the record.

You must then identify the new record as “Individual” or “Organization”, and the New Individual/Organization screen appears.

Warning: Use caution when matching registrants with constituent records. Make sure the registrant is the constituent to whom you are linking the online request.

All information included in the registrant’s online record defaults into the new constituent record. Click **Save and Close** or add additional information. For more information about adding a constituent record, see the *Constituent Data Entry Guide*.

- When you click **Save and Close**, you return to the Import Event Registrations Wizard screen.

RE Constituent	Event	Donor Information	Gift information	RE Constit Bank	Payment informa
Ben Franklin 890 Broad St. Charleston, SC 29401 Constit ID: 221	Spring Ball	Mr. Ben Franklin 444 Freedom Highway Phelidelphia, PA 123... United States Phone: (546) 987-0... Email: Bfranklin@a... Send email: Yes	\$1,000.00 08/07/2008 Cash Spring Ball 2 Corporate Spon...	Credit Card	Ben Franklin MasterCard 4444 4444 4444 44 08/09
Linda Kennedy 4444 South Park Poland, OH 44514 Constit ID: 218	Spring Ball	Ms. Linda Kennedy 444 South Park Poland, OH 44514 United States Phone: (330) 777-0... Email: lkennedy@a... Send email: Yes	\$120.00 08/07/2008 Cash Spring Ball 3 Couple	Credit Card	Linda Kennedy MasterCard 4444 4444 4444 44 08/09
Linda Kennedy	Spring Ball	Mr. Linda Kennedy	\$125.00	Credit Card	Linda Kennedy

The registrant's information now appears in the **RE Constituent** column.

8. In the **Enter the batch number to create or leave blank to use next available** field, enter the number to assign the batch file created with the downloaded information. To use the next number available in *Batch*, leave this field blank.
9. After you match the registrants with records in *The Raiser's Edge*, click **Create Batch**. The program generates a batch entry, and a screen appears, displaying the batch number.



10. Click **OK**. The Import Event Registrations Wizard screen appears with no registrant information.
11. To return to the Download Transactions screen, click **Close**.

You are now ready to open *Batch* and commit the registrant information to *The Raiser's Edge*. For information on committing batch entries, see the *Batch Guide*.

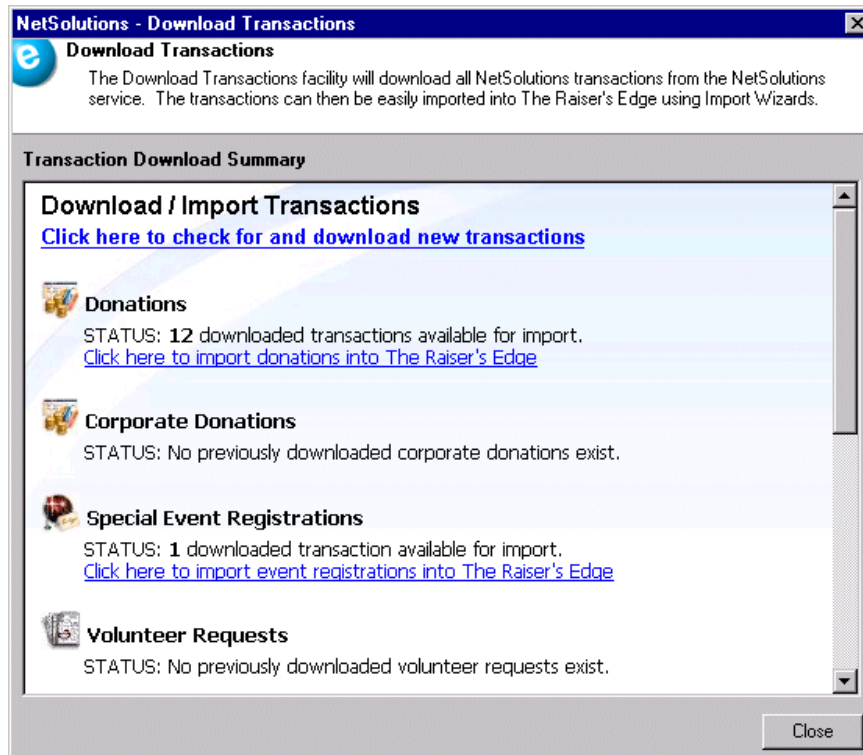
Downloading Information from Your Job Web Pages

You can download all online job registration information entered on your **NetVolunteers** Web pages, using the **Download Transactions** link in *NetSolutions*. Once downloaded, you match the downloaded information with the correct constituent records in your *Raiser's Edge* database. If a constituent record does not exist, you must create one.

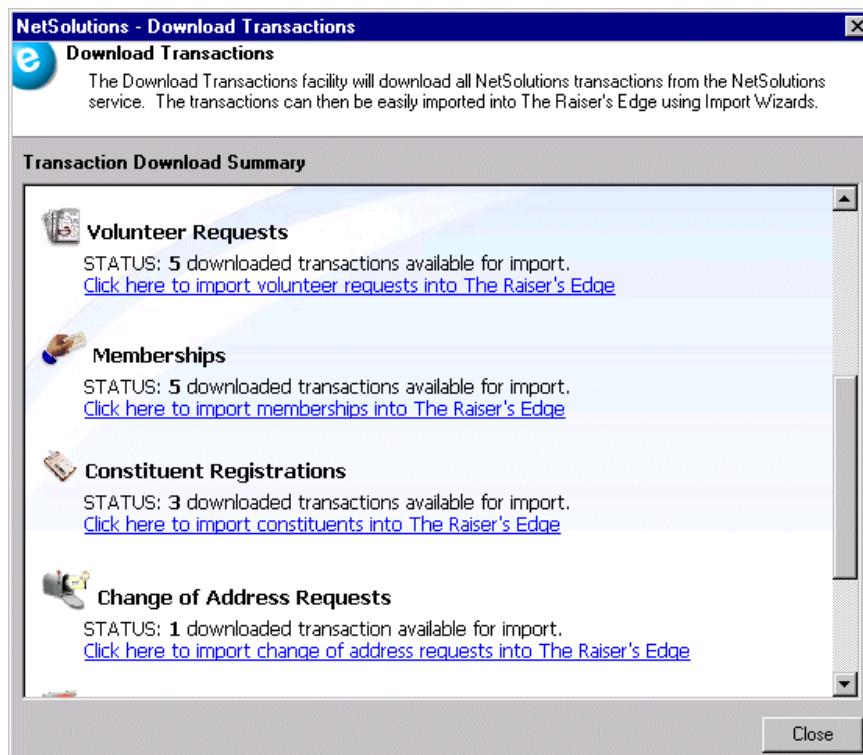
► Downloading job transactions from your Web site

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

2. Click **Download Transactions**. The Download Transactions screen appears.



3. Click the **Click Here to check for and download new transactions** link. A screen appears displaying the number of transactions downloaded.
4. Click **OK**. The Download Transactions screen appears.



Links to the downloaded transactions appear. The information is arranged based on the Web page from which the transactions were downloaded.

Note: The program does not overwrite downloaded transactions.

For instance, in the preceding example, five transactions were downloaded from the Web page created in **NetVolunteers**, and five online membership registrations were downloaded from the Web page created in **NetMembers**.

Note: If the constituent information defaults into the **RE Constituent** column when you open the Import Volunteers screen, the program has remembered the constituent from a previous download. You do not have to match them again with a constituent record.

- To import the job requests into *The Raiser's Edge*, click the **Click here to import volunteer requests into The Raiser's Edge** link under **Volunteer Requests**. The Import Volunteers screen appears.

RE Constituent	Volunteer Information	Job Requested	Interests	Availability	Comments
Peggy Lindsey 25 Water St. Cleveland, OH 44514 44514 Constit ID: 193	Ms. Peggy Lindsey 25 Water St. Cleveland, OH 44514 Phone: (216) 755-0987 Email: Denise.Kadilak... Send Email: Yes Birthdate: 6/22/1962	Special Events C...		Start Date: 0... End Date: 03... Sundays 1:0...	
	Mr. Sean Davenport 543 South Main St. West Chester, SC 29456 Phone: (843) 890-0987 Email: Denise.Kadilak... Send Email: Yes Birthdate: 2/22/1976	Special Events C...			I can work all...

Buttons: Delete Row..., Import Now, Cancel

Status: Press F7 to search for a constituent or F8 to add a new constituent

- Before entering the information into *The Raiser's Edge*, you must match the online **Volunteer Information** with a constituent record in your database, using the **RE Constituent** column. If the constituent record does not exist, you must create one. Place your cursor in the column next to the registrant to enter. Press **F8** on your keyboard to create a constituent record in *The Raiser's Edge*, based on the information downloaded from *NetSolutions*.

To manually search for and enter a constituent, place your cursor in the column next to the registrant to enter. Press **F7** on your keyboard. The Open screen appears.

Find	Search using query
Constituent	<Default>

Sean A. Davenport	2151 Brant Avenue	Miami, FL	15
Davenport Creamery	849 Milky Drive	Davenport, VA	105

Find Constituents that meet these criteria:

Last/Org name: Address lines:

First Name: City:

Constituent ID: State:

SSN: ZIP:

Membership ID: Class of:

Bank acct. no.: Credit card no.:

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

☐ Display deceased constituents
 ☐ Check aliases
 ☐ Check contact name

The registrant's name defaults into the name fields at the bottom of the screen.

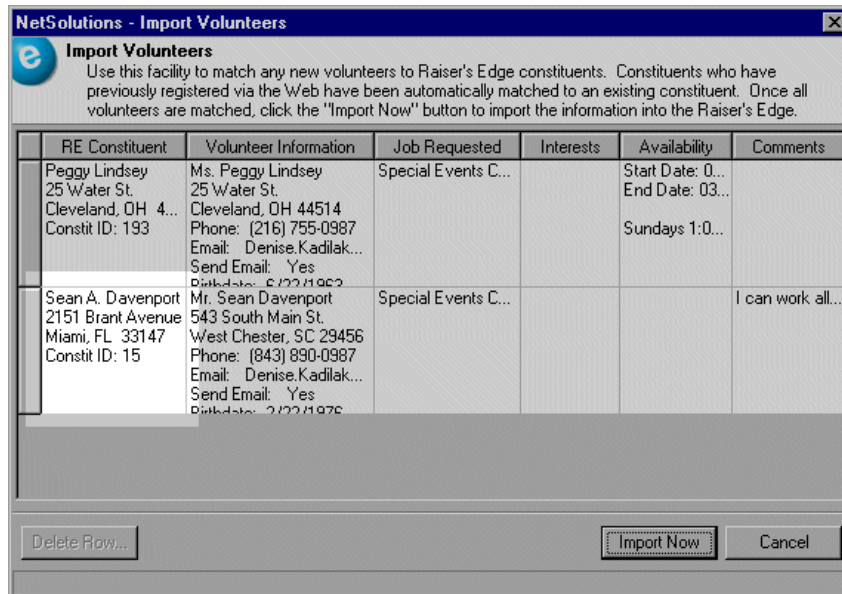
- If a constituent record already exists for the registrant, the registrant's name appears in the grid. Select the name, and click **Open** to return to the Import Volunteers screen.
- If the name does not already exist, click **Add New** to add the record.

You must then identify the new record as "Individual" or "Organization", and the New Individual/Organization screen appears.

Warning: Use caution when matching volunteers with constituent records. Make sure the volunteer is the constituent to whom you are linking the online information.

All information included in the volunteer's online record defaults into the new constituent record. Click **Save and Close** or add additional information. For more information about adding a constituent record, see the *Constituent Data Entry Guide*.

7. When you click **Save and Close**, you return to the Import Volunteers screen.



NetSolutions - Import Volunteers

Import Volunteers
Use this facility to match any new volunteers to Raiser's Edge constituents. Constituents who have previously registered via the Web have been automatically matched to an existing constituent. Once all volunteers are matched, click the "Import Now" button to import the information into the Raiser's Edge.

RE Constituent	Volunteer Information	Job Requested	Interests	Availability	Comments
Peggy Lindsey 25 Water St. Cleveland, OH 44115 Constit ID: 193	Ms. Peggy Lindsey 25 Water St. Cleveland, OH 44115 Phone: (216) 755-0987 Email: Denise.Kadlak... Send Email: Yes Birth Date: 6/22/1963	Special Events C...		Start Date: 0... End Date: 03... Sundays 1:0...	
Sean A. Davenport 2151 Brant Avenue Miami, FL 33147 Constit ID: 15	Mr. Sean Davenport 543 South Main St. West Chester, SC 29456 Phone: (843) 890-0987 Email: Denise.Kadlak... Send Email: Yes Birth Date: 2/22/1976	Special Events C...			I can work all...

Buttons: Delete Row..., Import Now, Cancel

The volunteer information now appears in the **RE Constituent** column.

8. After you match the volunteers with records in *The Raiser's Edge*, click **Import Now**. The program imports the information. A confirmation screen appears, telling you the requests have been imported.

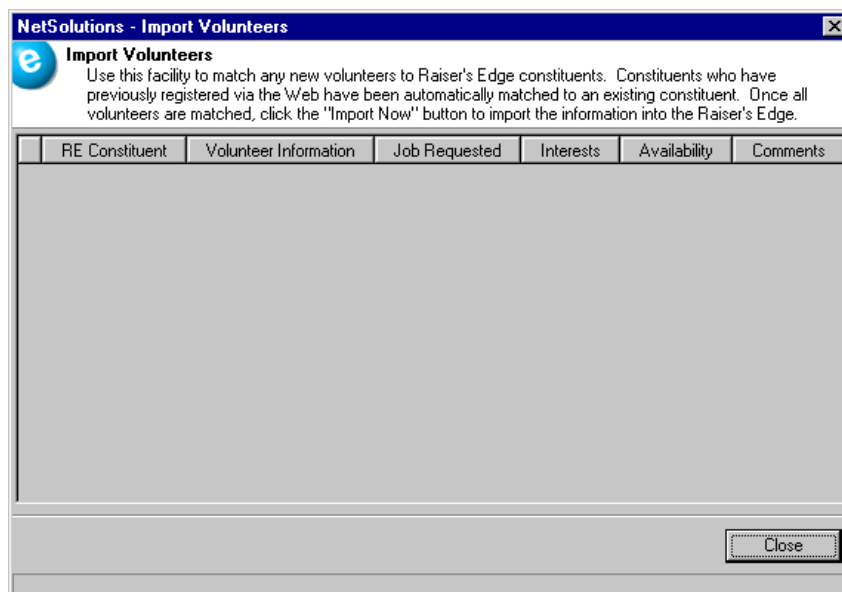


The Raiser's Edge

Volunteer requests have been imported.

OK

9. Click **OK**. The NetSolutions- Import Volunteer screen appears with no volunteer information.



NetSolutions - Import Volunteers

Import Volunteers
Use this facility to match any new volunteers to Raiser's Edge constituents. Constituents who have previously registered via the Web have been automatically matched to an existing constituent. Once all volunteers are matched, click the "Import Now" button to import the information into the Raiser's Edge.

RE Constituent	Volunteer Information	Job Requested	Interests	Availability	Comments

Buttons: Close

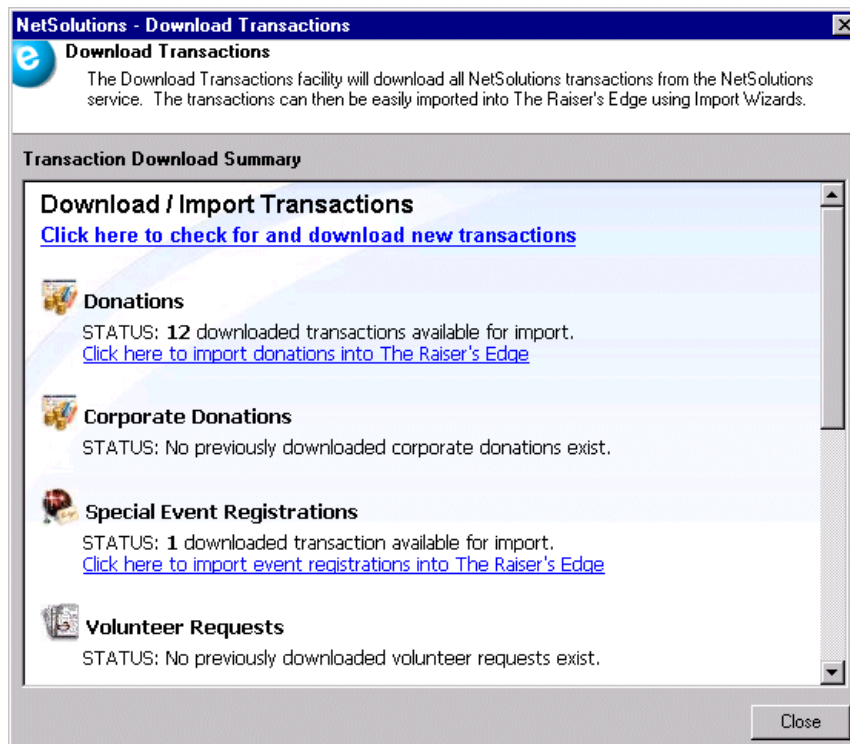
10. To return to the Download Transactions screen, click **Close**.

Downloading Information from Your Membership Web Pages

You can download all online membership information entered on your **NetMemberships** Web pages, using the **Download Transactions** link in *NetSolutions*. Once downloaded, you can commit all downloaded information to **The Raiser's Edge**. However, before committing information, you must match the downloaded information with constituent records in your **Raiser's Edge** database. If a constituent record does not exist, you must create one.

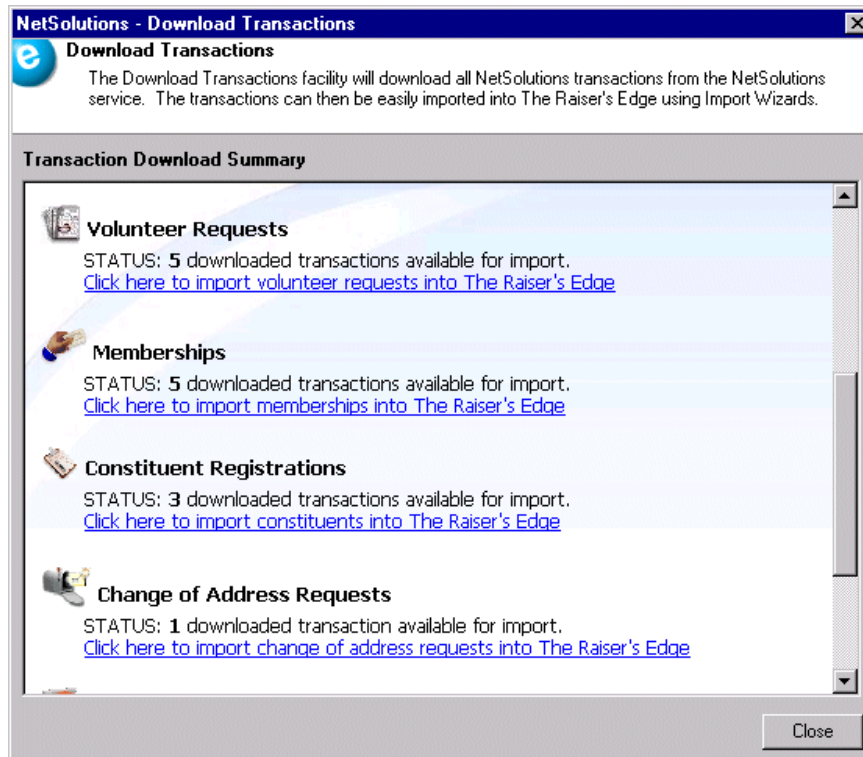
► Downloading membership information from your Web site

1. On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **Download Transactions**. The Download Transactions screen appears.



3. Click the **Click Here to check for and download new transactions** link. A screen appears, displaying the number of transactions downloaded.

4. Click **OK**. The Download Transactions screen appears.



Links to the downloaded transactions appear. The information is arranged based on the Web page from which the transactions were downloaded.

Note: The program does not overwrite downloaded transactions.

For instance, in the preceding example, five transactions were downloaded from the Web page created in **NetVolunteers**, and five online membership registrations were downloaded from the Web page created in **NetMembers**.

Note: If the constituent information defaults into the **RE Constituent** column when you open the Import Membership Wizard screen, the program has remembered the constituent from a previous download. You do not have to match them again with a constituent record.

- To import the membership information into **The Raiser's Edge**, click the **Click here to import memberships into The Raiser's Edge** link under **Memberships**. The Import Memberships Wizard screen appears.

NetSolutions - Import Memberships Wizard

Import Donations
Link downloaded transactions to Raiser's Edge records in this step.

RE Constituent	Donor information	RE Membership Recipient	Membership Recipient	RE Membership	Membership Request	
Mark D. Adamson 310 East Bay Charleston, SC 29401 Constit ID: 3	Mr. Mark Adams 123 Broad Charleston, SC 29401 Email: MarkA@aol... Send Email: No				Adopt an Animal Patron Bear Join <Existing memberships>	\$11 12 Ca Ad
Linda Kennedy 2233 Jonathan St. Cleveland, OH 44123 Constit ID: 203	Linda Kennedy 345 Summerville Dr. Charleston, SC 29401 Email: linda@juno... Send Email: Yes			Adopt an Animal Patron Flamingo Renew-Same Start: 12/07/2008 Expires: 12/07/2009	Adopt an Animal Patron Flamingo Join <Existing memberships>	\$11 12 Ca Ad
	Mr. Edward Brock 123 Second St. Cleveland, OH 44123 Email: edbrock@a... Send Email: Yes				Adopt an Animal Patron Bear Join	\$11 12 Ple Ad

Enter the batch number to create or leave blank to use next available:

Create Batch Cancel

Note: You can create a batch of the linked transactions even if there are other transactions unlinked. For example, if you have 300 memberships downloaded, link the first 50 and create a batch leaving the other 250 in the grid to link at a later date.

- Before entering the information into **The Raiser's Edge**, you must match online **Donor Information** with a constituent record in your database, using the **RE Constituent** column. If the constituent record does not exist, you must create one. Place your cursor in the **RE Constituent** column next to the **Donor information** to enter. Press **F8** on your keyboard to create a constituent record in **The Raiser's Edge**, based on the information downloaded from **NetSolutions**.

To manually search for and match **Donor Information** with a constituent record in your database, place your cursor in the **RE Constituent** column next to the **Donor information** to enter. Press **F7** on your keyboard. The Open screen appears.

Open

Find: Search using query:

Find Constituents that meet these criteria:

Last/Org name: Brock	Address lines:
First Name: Edward	City:
Constituent ID:	State:
SSN:	ZIP:
Membership ID:	Class of:
Bank acct. no.:	Credit card no.:

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

The donor's name defaults into the name fields at the bottom of the screen.

Note: For more information about adding a constituent record, see the *Constituent Data Entry Guide*.

- If a constituent record exists, the donor's name appears in the **Constituent Name** column. Select the name, and click **Open**. You return to the Import Membership Wizard screen.
- If the name does not exist, click **Add New** to add the record.

You must then identify the new record as "Individual" or "Organization", and the New Individual/Organization screen appears.

All information included in the donor's online record defaults into the new constituent record. You can add additional information, and click **Save and Close**. You return to the Import Membership Wizard screen.

The donor's information now appears in the **RE Constituent** column.

Warning: Use caution when matching online donors with constituent records. Make sure the donor is the constituent to whom you are linking the online gift.

Repeat this procedure for all online donors.

7. If the donation is a gift membership, the recipient of the membership appears in the **Membership Recipient** column. In the **RE Membership Recipient** column, you must match each **Membership Recipient** with a constituent record in your database. If the constituent record does not exist, you must create one.

- To complete the **RE Membership Recipient** column, place your cursor in the column next to the **Membership Recipient** name to enter. Press **F7** on your keyboard. The Open screen appears.

The membership recipient name defaults into the name fields at the bottom of the screen.

- If a constituent record already exists, the membership recipient name appears in the grid. Select the name, and click **Open**. You return to the Import Memberships Wizard screen.
- If the name does not already exist, click **Add New** to add the record.

Note: For more information about adding a constituent record, see the *Constituent Data Entry Guide*.

You must then identify the new record as “Individual” or “Organization”, and the New Individual/Organization screen appears.

All information included in the membership recipient’s online record defaults into the new constituent record. You can add additional information and click **Save and Close**. You return to the Import Memberships Wizard screen.

RE Constituent	Donor information	RE Membership Recipient	Membership Recipient	RE Membership	Membership Request
Linda Kennedy 2233 Jonathan St. Cleveland, OH 4... Constit ID: 203	Linda Kennedy 345 Summerville Dr. Charleston, SC 29401 Email: linda@yuno... Send Email: Yes			Adopt an Animal Patron Flamingo Renew-Same Join Start: 12/07/2008 Expires: 12/07/2009	Adopt an Animal Patron Flamingo Join <Existing memberships>
Edward Brock 123 Second St. Cleveland, OH 4... Constit ID: 213	Mr. Edward Brock 123 Second St. Cleveland, OH 44123 Email: edbrock@a... Send Email: Yes			Adopt an Animal Patron Bear Join Start: 12/07/2008 Expires: 12/07/2009	Adopt an Animal Patron Bear Join <No existing membershi...
Linda Kennedy 2233 Jonathan St. Cleveland, OH 4... Constit ID: 203	Linda Kennedy 345 Summerville Dr. Charleston, SC 29401 Email: linda@yuno... Send Email: Yes	Marie Kennedy 1225 Water St. Poland, OH 44514 Constit ID: 214	Marie Kennedy 1225 Water St. Poland, OH 44514 E-mail: Mkennedy@aol...		Adopt an Animal Patron Bear Join <No existing membershi...

The membership recipient information now appears in the **RE Membership Recipient** column. Repeat this procedure for all membership recipients.

9. You must also match the online **Membership Request** with an **RE Membership**. This is a membership record in *The Raiser's Edge*. If the membership record exists and matches the online information, the **RE Membership** column completes automatically. If the **RE Membership** record cannot be located automatically, you must manually complete the column.
10. To manually complete the **RE Membership** column, place your cursor in the column next to the **Membership Request** to enter.

RE Constituent	Donor information	RE Membership Recipient	Membership Recipient	RE Membership	Membership Request
Mark D. Adamson 310 East Bay Charleston, SC 2... Constit ID: 3	Mr. Mark Adams 123 Broad Charleston, SC 29401 Email: MarkA@aol... Send Email: No				Adopt an Animal Patron Bear Join <Existing memberships>
Linda Kennedy 2233 Jonathan St. Cleveland, OH 4... Constit ID: 203	Linda Kennedy 345 Summerville Dr. Charleston, SC 29401 Email: linda@juno... Send Email: Yes			Adopt an Animal Patron Flamingo Renew-Same Start: 12/07/2008 Expires: 12/07/2009	Adopt an Animal Patron Flamingo Join <Existing memberships>
Edward Brock 123 Second St. Cleveland, OH 4... Constit ID: 213	Mr. Edward Brock 123 Second St. Cleveland, OH 44123 Email: edbrock@a... Send Email: Yes			Adopt an Animal Patron Bear Join Start: 12/07/2008 Expires: 12/07/2009	Adopt an Animal Patron Bear Join <No existing membershi...
Linda Kennedy 2233 Jonathan St. Cleveland, OH 4...	Linda Kennedy 345 Summerville Dr. Charleston, SC 29401	Marie Kennedy 1225 Water St. Poland, OH 44514	Marie Kennedy 1225 Water St. Poland, OH 44514		Adopt an Animal Patron Bear

11. Press **F7** on your keyboard. The Link Membership Information screen appears.

Link Membership Information

Information entered by the Donor (Mark D. Adamson):
 Program: Adopt an Animal Transaction type requested: Joined
 Category: Patron Gift of membership: No
 Subcategory: Bear

Based on the information entered by the donor, a new Adopt an Animal - Patron - Bear membership should be created for Mark D. Adamson. Is this correct?

☒ Yes, create a new Adopt an Animal - Patron - Bear membership for Mark D. Adamson.
☐ No, add a new transaction to an existing membership for Mark D. Adamson.

Select	Program	Category	Subcategory	Standing	Last Activity	Last Activity Date	Expires
☐	Adopt an A...	Contributor	Tiger	Lapsed	Renewal	07/20/2007	07/20/20...

Joined on: 12/07/2008
 Expires: 12/07/2009

- If no membership record matching the request exists for the membership recipient create a new membership by selecting **Yes, create a new <Program - Category - Subcategory> membership for <membership recipient>**.

- If the membership recipient has an existing membership record linked to his constituent record, it appears in the grid. To activate the grid and select the existing membership record, select the **No, add a new transaction to an existing membership for <membership recipient>** option.

Link Membership Information

Information entered by the Donor (Mark D. Adamson):
 Program: Adopt an Animal Transaction type requested: Joined
 Category: Patron Gift of membership: No
 Subcategory: Bear

Based on the information entered by the donor, a new Adopt an Animal - Patron - Bear membership should be created for Mark D. Adamson. Is this correct?

☐ Yes, create a new Adopt an Animal - Patron - Bear membership for Mark D. Adamson.
☒ No, add a new transaction to an existing membership for Mark D. Adamson.

Select	Program	Category	Subcategory	Standing	Last Activity	Last Activity Date	Expires
☒	Adopt an A...	Contributor	Tiger	Lapsed	Renewal	07/20/2007	07/20/20...

New transaction type: Renew - Upgrade View Membership

Upgraded on: 12/07/2008
 Expires: 12/07/2009

OK Cancel

In the **Select** column, mark the checkbox next to the membership to link to the request.

Note: Options, fields, and checkboxes included on the Link Membership Information screen change based on information included in the membership record, preferences selected, and the transaction specified by the online donor. This page offers just one example of the Link Membership Information screen.

In the **New transaction type** field, designate the updated membership as an “Upgrade” or “Downgrade”.

The first date field at the bottom of the screen changes, based on your selections in the upper part of the screen: **Joined on/Upgrade or/Downgraded on**. The date defaults to the date the information is added.

Enter an **Expires** date.

Click **View Membership** to view the existing membership to which you are linking the membership request. The Membership screen appears.

You cannot change this screen from **Downloading Transaction**. You must open the record in **The Raiser’s Edge** to make any changes. To close this screen and return to the Link Membership Information screen, click the “X” in the upper right corner.

Note: For detailed instructions about working in a membership record, see the *Membership Data Entry Guide*.

Click **OK**. You return to the Import Memberships Wizard screen. The RE Membership column is complete.

RE Constituent	Donor information	RE Membership Recipient	Membership Recipient	RE Membership	Membership Request
Mark D. Adamson 310 East Bay Charleston, SC 2... Constit ID: 3	Mr. Mark Adams 123 Broad Charleston, SC 29401 Email: MarkA@aol... Send Email: No			Adopt an Animal Patron Bear Renew-Upgrade Start: 12/07/2008 Expires: 12/07/2009	Adopt an Animal Patron Bear Join <Existing memberships>
Linda Kennedy 2233 Jonathan St. Cleveland, OH 4... Constit ID: 203	Linda Kennedy 345 Summerville Dr. Charleston, SC 29401 Email: linda@uno... Send Email: Yes			Adopt an Animal Patron Flamingo Renew-Same Start: 12/07/2008 Expires: 12/07/2009	Adopt an Animal Patron Flamingo Join <Existing memberships>
Edward Brock 123 Second St. Cleveland, OH 4... Constit ID: 213	Mr. Edward Brock 123 Second St. Cleveland, OH 44123 Email: edbrock@a... Send Email: Yes			Adopt an Animal Patron Bear Join Start: 12/07/2008 Expires: 12/07/2009	Adopt an Animal Patron Bear Join <No existing membershi...
Linda Kennedy 2233 Jonathan St. Cleveland, OH 4...	Linda Kennedy 345 Summerville Dr. Charleston, SC 29401	Marie Kennedy 1225 Water St. Poland, OH 44514	Marie Kennedy 1225 Water St. Poland, OH 44514		Adopt an Animal Patron Bear

The Import Membership Wizard screen also displays **Gift information** downloaded from the membership Web page and, if the donor used a credit card, it displays **Credit Card** information.

RE Membership Recipient	Membership Recipient	RE Membership	Membership Request	Gift information	Credit Card
		Adopt an Animal Patron Bear Renew-Upgrade Start: 12/07/2008 Expires: 12/07/2009	Adopt an Animal Patron Bear Join <Existing memberships>	\$100.00 12/05/2008 Cash Adopt an Animal ... 10/2009	Mark Adams MasterCard 4444 4444 44... 10/2009
		Adopt an Animal Patron Flamingo Renew-Same Start: 12/07/2008 Expires: 12/07/2009	Adopt an Animal Patron Flamingo Join <Existing memberships>	\$100.00 12/07/2008 Cash Adopt an Animal ... 10/2009	Linda Kennedy MasterCard 4444 4444 44... 10/2009
		Adopt an Animal Patron Bear Join Start: 12/07/2008 Expires: 12/07/2009	Adopt an Animal Patron Bear Join <No existing membershi...	\$100.00 12/07/2008 Pledge Adopt an Animal ...	
Marie Kennedy 1225 Water St. Poland, OH 44514	Marie Kennedy 1225 Water St. Poland, OH 44514	Adopt an Animal Patron Bear	Adopt an Animal Patron Bear	\$100.00 12/07/2008 Cash	Linda Kennedy MasterCard 4444 4444 44...

Note: Gifts created in *Batch* are linked to the corresponding membership.

12. In the **Enter the batch number to create or leave blank to use next available** field, enter the number to assign the batch file created with the downloaded information. To use the next number available in *Batch*, leave this field blank.
13. After you complete the Import Membership Wizard screen, click **Create Batch**. The program generates a batch entry, and a screen appears displaying the batch number.



14. Click **OK**. The Import Memberships Wizard screen appears with no membership information.
15. To return to the Download Transactions screen, click **Close**.

You are now ready to open *Batch* and commit the membership information to **The Raiser's Edge**. For information on committing batch entries, see the *Batch Guide*.

Downloading Advocacy Information

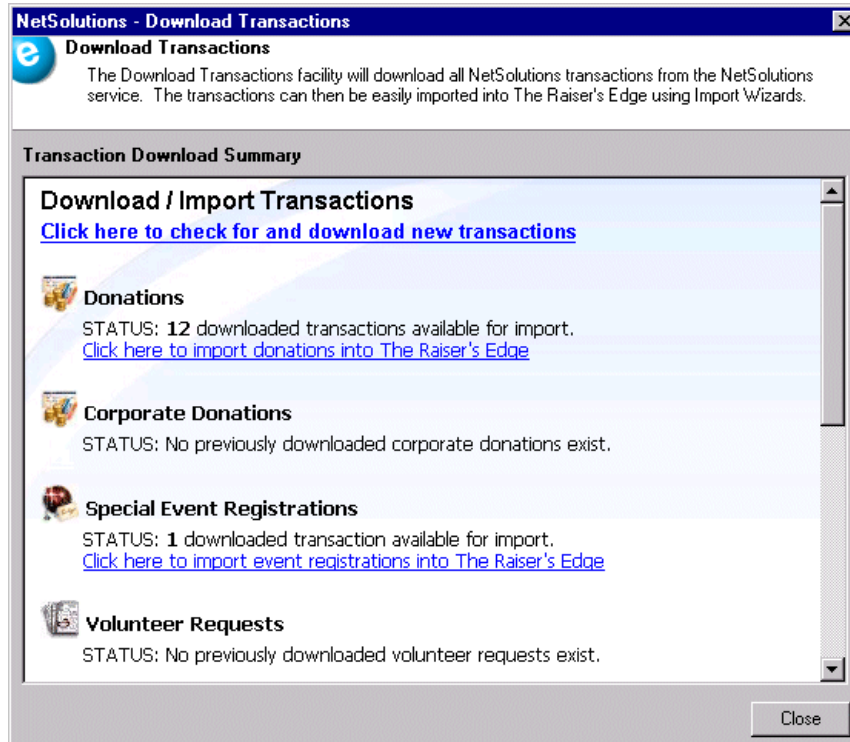
With *NetSolutions*, you can include a link in your **NetMail** email messages advocating recipients to take a specific action, such as contact their representative or show up for a protest march. Using **Download Transactions** you can download a list of constituents who visited the link.

Once downloaded, you must match the new information with constituent records in your *Raiser's Edge* database. If a constituent record does not exist, you must create one. The information is added to the constituent action record.

► Downloading advocacy actions

Warning: Advocacy users working in *NetSolutions* without security rights to credit card information can download transactions. They cannot, however, import the transactions into *The Raiser's Edge*.

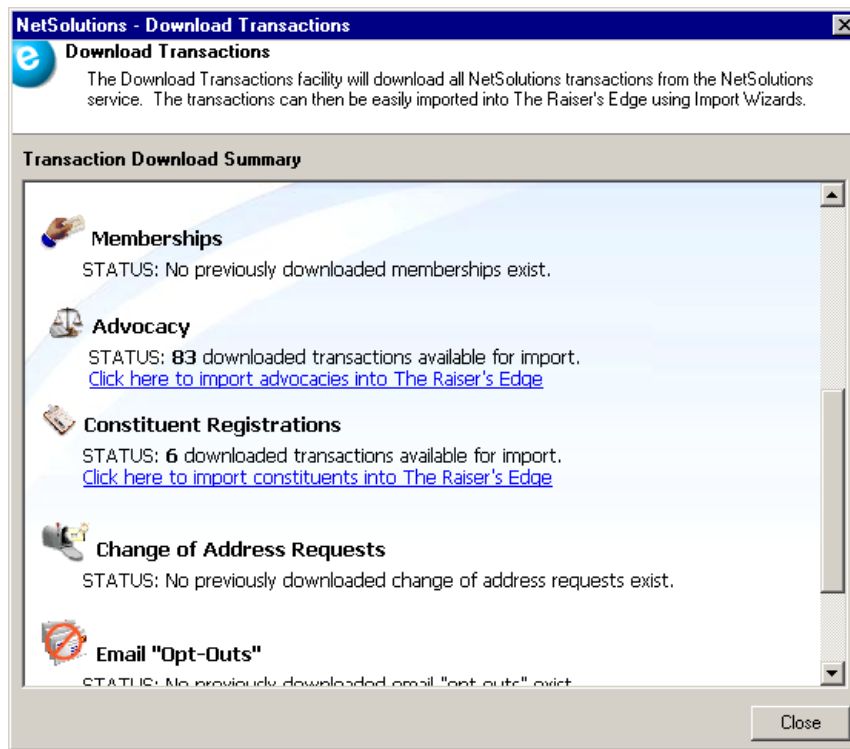
1. On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **Download Transactions**. The Download Transactions screen appears.



Note: *NetSolutions* downloads up to a maximum of 1,000 online transactions at a time. If, after downloading transactions, the **Status** fields on the Transaction Download Summary screen add up to 1,000 transactions, you may want to click the **Click here to check for and download new transactions** link a second time, to make sure you download all online data.

3. Click the **Click here to check for and download new transactions** link. A screen appears, displaying the number of transaction downloaded.

- Click **OK**. The Download Transactions screen appears, displaying links to the downloaded transactions. The information is arranged based on the Web page from which the transactions were downloaded.

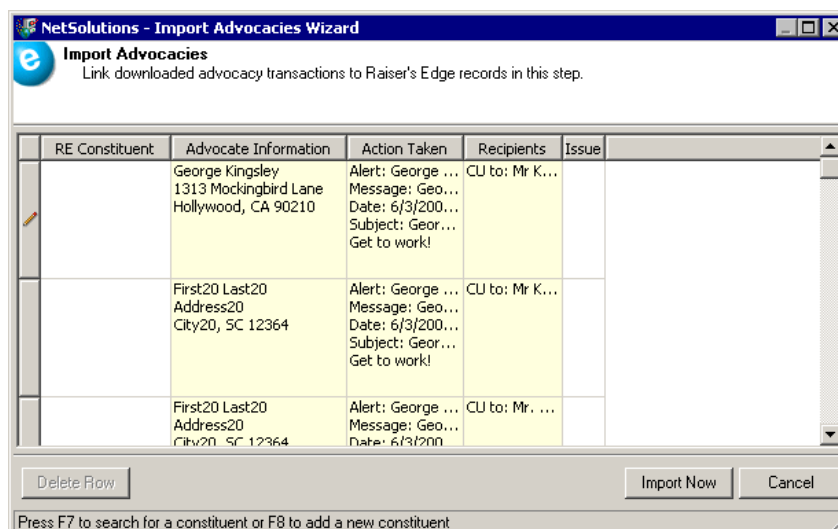


Note: The program does not overwrite downloaded transactions.

For instance, in the preceding example, 83 advocacy hits were downloaded from your *Capwiz* Web page.

Note: If the constituent information defaults into the **RE Constituent** column when you open the Import Advocacies screen, the program has remembered the constituent from a previous download. You do not have to match them again with a constituent record in your database.

- To import the advocacy action information into *The Raiser's Edge*, click the **Click here to import advocacies into The Raiser's Edge** link under **Advocacy**. The Import Advocacies screen appears.



Downloaded information appears in the **Advocate information** column.

Note: You can create a batch of the linked transactions even if there are other transactions unlinked. For example, if you have 300 advocacy transactions downloaded, link the first 50 and create a batch leaving the other 250 in the grid to link at a later date.

6. You must match the **Advocate Information** with a constituent record in your database using the **RE Constituent** column. If the constituent record does not exist, you must create one. Place your cursor in the **RE Constituent** column next to the advocate to enter. Press **F8** on your keyboard to create a constituent record in *The Raiser's Edge*, based on the information downloaded from *NetSolutions*.

To manually search for and match the **Advocate Information** with a constituent record in your database, place your cursor in the **RE Constituent** column next to the advocate to enter. Press **F7** on your keyboard. The Open screen appears.

The registrant's name defaults in the name fields at the bottom of the screen.

- If a constituent record already exists, the registrant's name appears in the **Constituent Name** column. Select the name, and click **Open**. You return to the Import Advocacies screen.
- If the name does not already exist, click **Add New** to add the record.

You must then identify the new record as "Individual" or "Organization". The New Individual/Organization screen appears.

Warning: Use caution when matching online advocates with constituent records in *The Raiser's Edge*. Make sure the advocate is the constituent to whom you are linking the online information.

All information included in the online record defaults into the new constituent record. Click **Save and Close** or add additional information. For more information about adding a constituent record, see the *Constituent Data Entry Guide*.

When you click **Save and Close**, you return to the Import Advocacies screen.

RE Constituent	Advocate Information	Action Taken	Recipients	Issue
George Kingsley 1313 Mockingbird Lane Hollywood, CA 90210 Constit ID: 237	George Kingsley 1313 Mockingbird Lane Hollywood, CA 90210	Alert: George ... Message: Geo... Date: 6/3/200... Subject: Geor... Get to work!	CU to: Mr K...	
First20 Last20 Address20 City20, SC 12364	First20 Last20 Address20 City20, SC 12364	Alert: George ... Message: Geo... Date: 6/3/200... Subject: Geor... Get to work!	CU to: Mr K...	
First20 Last20 Address20 City20, SC 12364	First20 Last20 Address20 City20, SC 12364	Alert: George ... Message: Geo... Date: 6/3/200... Subject: Geor... Get to work!	CU to: Mr. ...	

The **Advocate Information** now appears in the **RE Constituent** column.

7. The read-only **Action Taken** column displays information from *Capwiz* based on the action taken by the constituent.
 - Alert: The title of the alert set up by your organization
 - Message: The email subject used in the advocacy email you sent the client
 - Date: The date the action was taken
 - Subject: The subject of the action
8. Next, assign an issue to the downloaded advocate using the **Issue** column on the Import Advocacies screen.

Note: For more information about the **Issue table**, see the Configuration chapter in the *Configuration & Security Guide*.

In the **Issue** column, select the issue associated with the downloaded advocate. Options available in the **Issue** column depend on information entered in the **Issue table** in *The Raiser's Edge*. The options are also tied to the "alert ID" in *Capwiz*, so when an issue is selected, all records with the same "alert ID" are automatically associated with the same issue. However, you can manually change any issue.

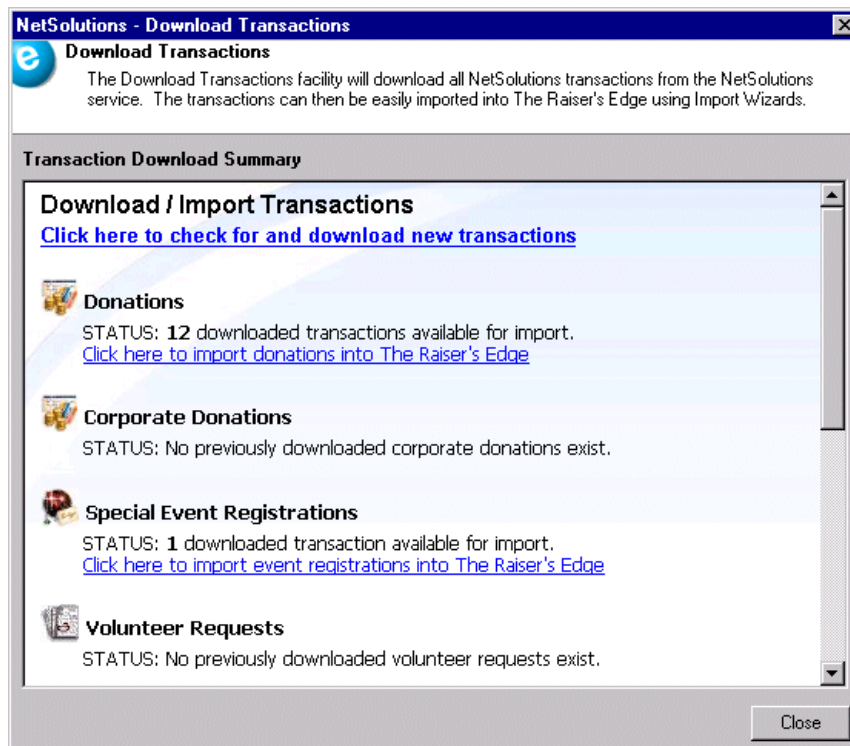
9. After you match the advocates with constituent records and issues in *The Raiser's Edge*, click **Import Now**. The program creates an action record for all linked transactions. A screen appears confirming the information downloaded.
10. Click **OK**. The Import Advocacies screen appears with no advocate information.
11. To return to the Download Transactions screen, click **Close**.

Downloading Constituent Registration Information

With *NetSolutions*, you can include a link on your *NetSolutions* Web page, encouraging visitors to the Web page to register as a constituent with your organization. The visitors do not have to make a donation, register for an event, or volunteer for a job. They simply enter basic biographical information you can download into your **Raiser's Edge** database. You can then use the information for prospecting purposes. You download this information using the **Download Transactions** link. Once downloaded, you must match the new information with records in your **Raiser's Edge** database, or if a constituent record does not exist, you must create one.

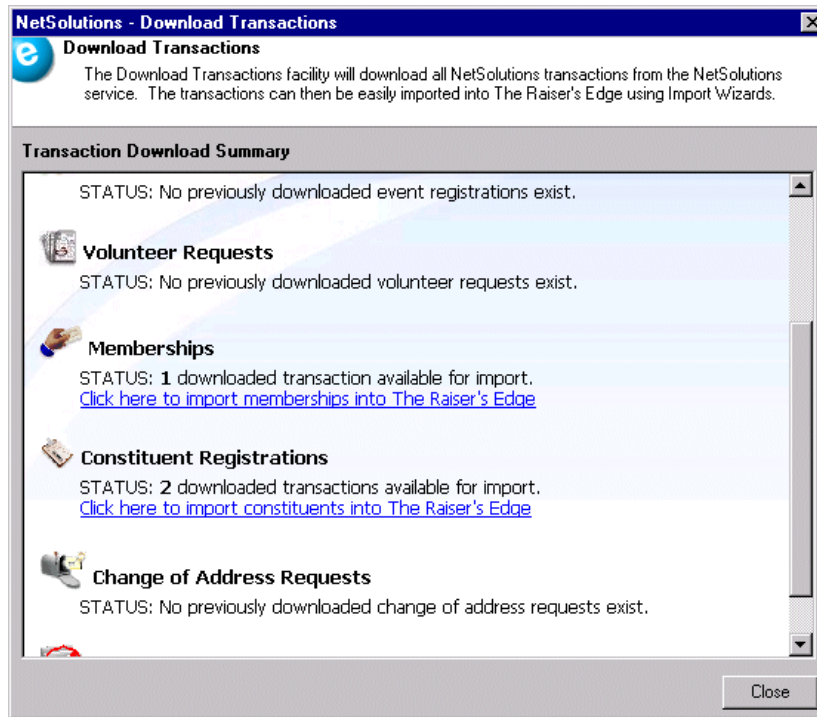
► **Downloading constituent registration information**

1. On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **Download Transactions**. The Download Transactions screen appears.



3. Click the **Click Here to check for and download new transactions** link. A screen appears, displaying the number of transaction downloaded.

4. Click **OK**. The Download Transactions screen appears.



Links to the downloaded transactions appear. The information is arranged based on the Web page from which the transactions were downloaded.

Note: The program does not overwrite downloaded transactions.

For instance, in the preceding example, one membership gift was downloaded from the **NetMembers** Web page, and two constituent registrations were downloaded from the Online Registration Web page.

Note: If the constituent information defaults into the **RE Constituent** column when you open the Import Constituent Registrations screen, the program has remembered the constituent from a previous download. You do not have to match them again with a constituent record in your database.

5. To import the online constituent into *The Raiser's Edge*, click the **Click here to import constituents into The Raiser's Edge** link under **Constituent Registrations**. The Import Constituent Registrations screen appears.

RE Constituent	Registrant information
	Ms. Linda Kennedy 319 Summerville Dr. Charleston, SC 29401 Email: linda@juno.com Send Email: Yes
	Mr. Ben Farly 123 South Main St. Charleston, SC 29401 Phone: (843) 987-0987 Email: BenF@Juno.com Send Email: Yes

Buttons: Delete Row..., OK, Cancel

Downloaded information appears in the **Registrant information** column.

6. You must match the **Registrant Information** with a constituent record in your database, using the **RE Constituent** column. If the constituent record does not exist, you must create one.
7. Place your cursor in the **RE Constituent** column next to the registrant to enter. Press **F8** on your keyboard to create a constituent record in *The Raiser's Edge*, based on the information downloaded from *NetSolutions*.

To manually search for and match the **Registrant Information** with a constituent record in your database, place your cursor in the **RE Constituent** column next to the registrant to enter. Press **F7** on your keyboard. The Open screen appears.

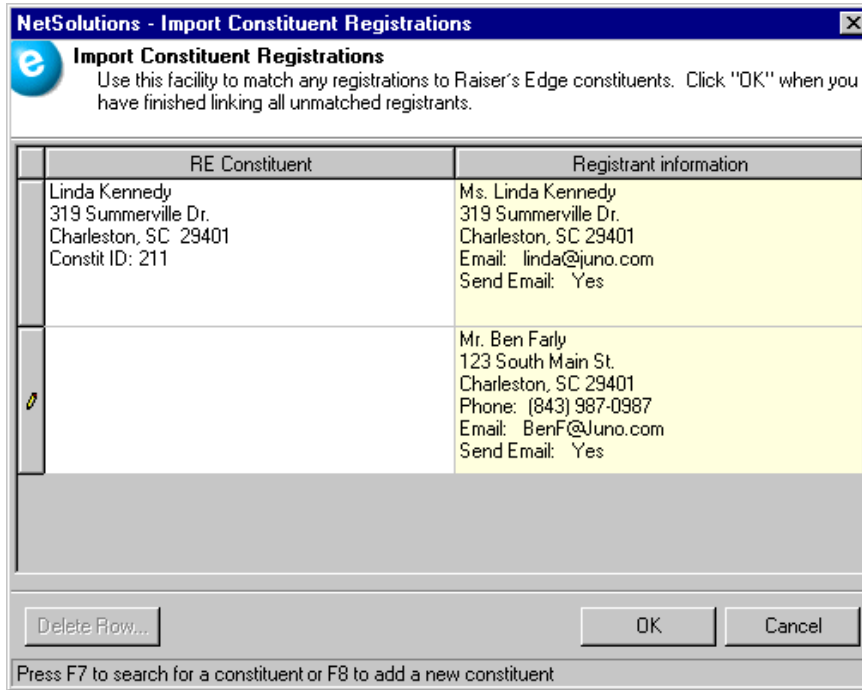
The registrant's name defaults in the name fields at the bottom of the screen.

- If a constituent record already exists, the registrant's name appears in the grid.
Select the name, and click **Open**. You return to the Import Constituent Registrations screen.
- If the name does not already exist, click **Add New** to add the record.
You must then identify the new record as "Individual" or "Organization", and the New Individual/Organization screen appears.

Warning: Use caution when matching online constituent registrants with constituent records in *The Raiser's Edge*. Make sure the registrant is the constituent to whom you are linking the online information.

All information included in the registrant's online record defaults into the new constituent record. Click **Save and Close** or add additional information. For more information about adding a constituent record, see the *Constituent Data Entry Guide*.

When you click **Save and Close**, you return to the Import Constituent Registrations screen.



NetSolutions - Import Constituent Registrations

Import Constituent Registrations
Use this facility to match any registrations to Raiser's Edge constituents. Click "OK" when you have finished linking all unmatched registrants.

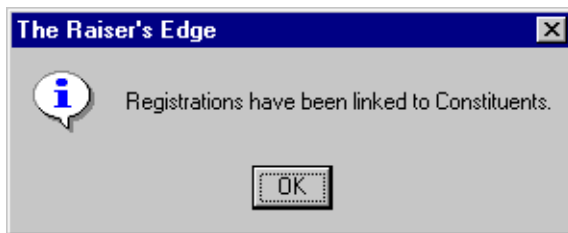
RE Constituent	Registrant information
Linda Kennedy 319 Summerville Dr. Charleston, SC 29401 Constit ID: 211	Ms. Linda Kennedy 319 Summerville Dr. Charleston, SC 29401 Email: linda@juno.com Send Email: Yes
	Mr. Ben Farly 123 South Main St. Charleston, SC 29401 Phone: (843) 987-0987 Email: BenF@Juno.com Send Email: Yes

Delete Row... OK Cancel

Press F7 to search for a constituent or F8 to add a new constituent

The **Registrant information** now appears in the **RE Constituent** column.

8. After you match the registrants with records in *The Raiser's Edge*, click **OK**. A screen appears confirming the registrations linked to the constituent records.

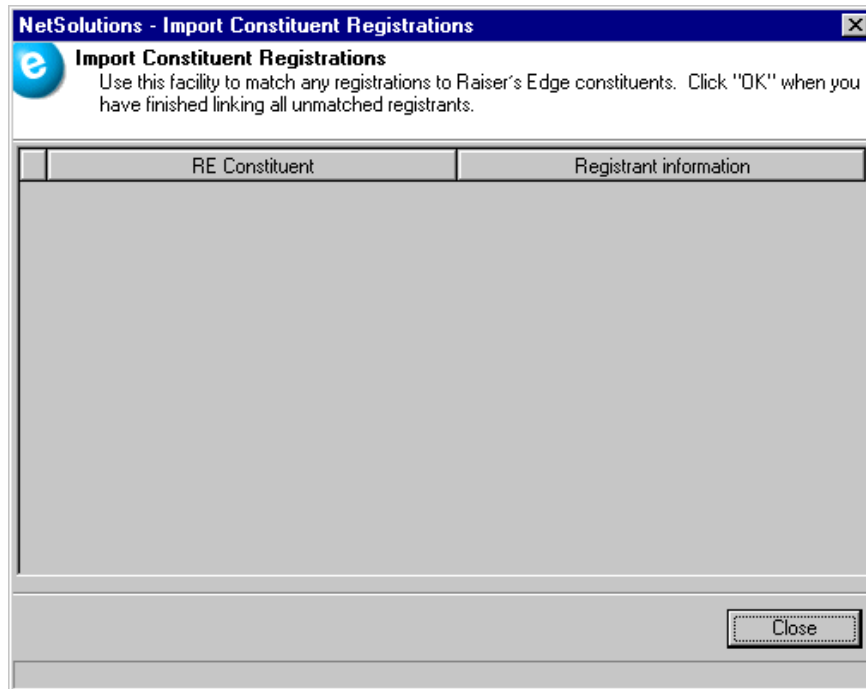


The Raiser's Edge

Registrations have been linked to Constituents.

OK

9. Click **OK**. The Import Constituent Registrations screen appears with no registrant information.



10. To return to the Download Transactions screen, click **Close**.

Downloading Change of Address Information

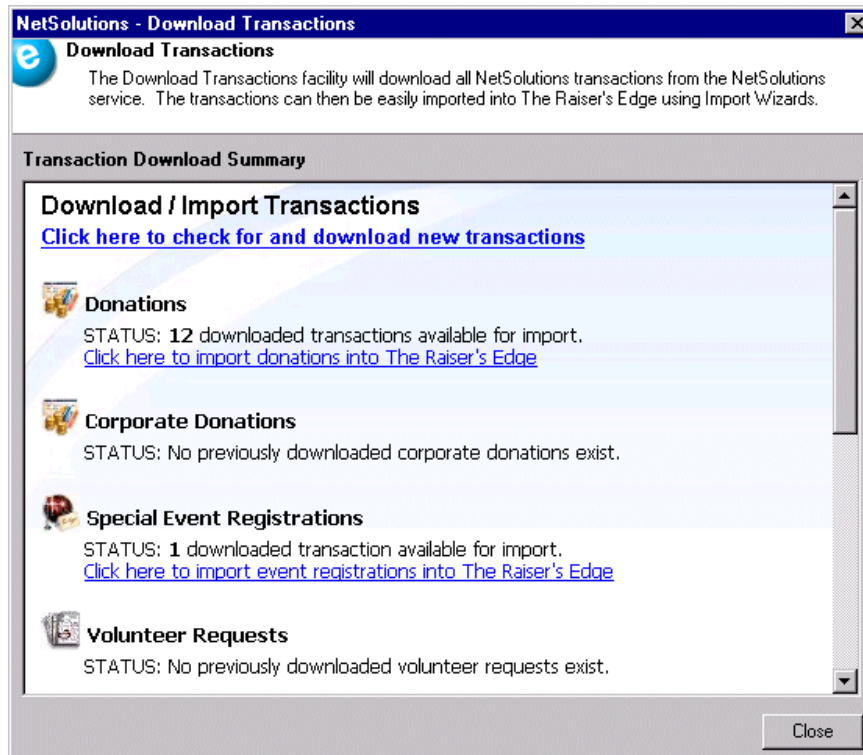
With *NetSolutions*, you can include a link in your **NetMail** messages, so the email recipients can change their address information. Also, constituents visiting your *NetSolutions* Web pages can update their address information. Using the **Download Transactions** link, you download any online address updates to your *Raiser's Edge* database.

Note: Online address changes are allowed for individual constituent records only. You cannot change organization records.

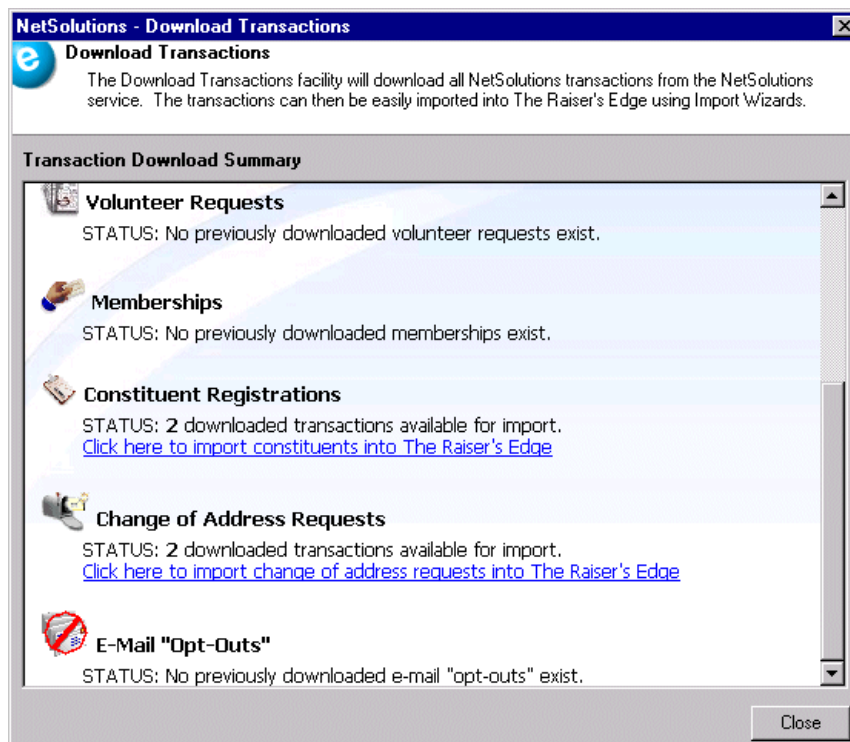
► Downloading change of address information

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

2. Click **Download Transactions**. The Download Transactions screen appears.



3. Click the **Click Here to check for and download new transactions** link. A screen appears, displaying the number of transactions downloaded.
4. Click **OK**. The Download Transactions screen appears.



Links to the downloaded transactions appear. The information is arranged based on the Web page from which the transactions were downloaded. Scroll down to **Change of Address Requests**.

Note: The program does not overwrite downloaded transactions.

In the example above, two change of address requests were downloaded from the *NetSolutions* server.

Note: If the constituent information defaults into the **RE Constituent** column when you open the Import Change of Address Requests screen, the program has remembered the constituent from a previous download. You do not have to match them again with a constituent record in your database.

5. To import the new address information into *The Raiser's Edge*, click the **Click here to import change of address requests into The Raiser's Edge** link under **Change of Address Requests**. The Import Change of Address screen appears.

RE Constituent	Downloaded Information	Update Option
	Ms. Sue Brady 25 Water St. Poland, OH 44514 Email: sue@aol.com Send Email: No	Update preferred address
Mark D. Adamson 125 Smokerise Way Charleston, SC 29401 Home: 843-798-6698 Email: denise.kadilak@blackbau... Constit ID: 3	Mr. Mark Adamson 310 East Bay Charleston, SC 29401 Email: MarkAdam@aol.com Send Email: No	Update preferred address

Delete Row... Import Now Cancel

The updated address information appears in the **Downloaded Information** column, and the constituent record appears in the corresponding row in the **RE Constituent** column.

6. If the **RE Constituent** column appears empty, you must manually match the downloaded address with a constituent record in your database. If no constituent record exists, you must create one.

- To manually complete the **RE Constituent** column, place your cursor in the column next to the downloaded address to enter. Press **F7** on your keyboard. The Open screen appears.

Open

Find: Search using query:

Sue Brady	33 Main St.	Charleston, SC	205

Buttons: Open, Cancel, Add New, Options, Find Now, New Search, Previous Search, Expand Results

Find Constituents that meet these criteria:

Last/Org name: Brady	Address lines:
First Name: Sue	City:
Constituent ID:	State:
SSN:	ZIP:
Membership ID:	Class of:
Bank acct. no.:	Credit card no.:

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

The updating constituent's name defaults into the name fields at the bottom of the screen.

- If a constituent record already exists, the constituent name appears in the grid. Select the name and click **Open**. You return to the Import Change of Address Requests screen.
- If the name does not already exist, click **Add New** to add the record.

You must then identify the new record as "Individual" or "Organization", and the New Individual/Organization screen appears.

All information included in the downloaded record defaults into the new constituent record. Add any additional information, and click **Save and Close**. You return to the Import Change of Address Requests screen. For more information about adding a constituent record, see the *Constituent Data Entry Guide*.

NetSolutions - Import Change of Address Requests

Import Change of Address Requests
Use this facility to match any change of address requests to Raiser's Edge constituents. Once all constituents are matched, click the "Import Now" button to import the information into the Raiser's Edge.

RE Constituent	Downloaded Information	Update Option
Sue Brady 33 Main St. Charleston, SC 29401 unknown: (843) 654-0987 Email: denise.kadlak@blackbau... Constit ID: 205	Ms. Sue Brady 25 Water St. Poland, OH 44514 Email: sue@aol.com Send Email: No	Add new preferred address
Mark D. Adamson 125 Smokerise Way Charleston, SC 29401 Home: 843-798-6698 Email: denise.kadlak@blackbau... Constit ID: 3	Mr. Mark Adamson 310 East Bay Charleston, SC 29401 Email: MarkAdam@aol.com Send Email: No	Update preferred address

Buttons: Delete Row..., Import Now, Cancel

The constituent and new address appear in the **RE Constituent** column.

8. In the **Update Option** column, select how you want the new address added to the constituent record. The program defaults to the “Update preferred address” option. This overrides the existing preferred address with the new address. However, you can opt to add the new address to the record as the preferred address and keep the old address.

Place your cursor in the **Update Option** column next to the **Downloaded Information** to update. Press **F7** on your keyboard. The Change of Address Update Options screen appears.

Change of Address Update Options

Sue Brady

The preferred address for this constituent is currently:

33 Main St.
Charleston, SC 29401

Type	Number
unknown	(843) 654-0987
Email:	denise.kadlak@blackb...

The downloaded address information is:

25 Water St.
Poland, OH 44514

Type	Number

☐ Add the downloaded information as a new address for this constituent
☐ Make this new address the preferred address
☒ Update the preferred address with the downloaded information

OK Cancel

9. Select the **Update the preferred address with the downloaded information** default option, or select to **Add the downloaded information as a new address for this constituent**.

Change of Address Update Options

Sue Brady

The preferred address for this constituent is currently:

33 Main St.
Charleston, SC 29401

Type	Number
unknown	(843) 654-0987
Email:	denise.kadlak@blackb...

The downloaded address information is:

25 Water St.
Poland, OH 44514

Type	Number

☒ Add the downloaded information as a new address for this constituent
☒ Make this new address the preferred address
☐ Update the preferred address with the downloaded information

OK Cancel

The **Add the downloaded information as a new address for this constituent** option saves the old address and adds the new address as preferred. To designate the new address as preferred on the constituent record, mark the **Make this new address the preferred address** checkbox. The old address still remains on the constituent record, but it is no longer designated the preferred address. This option also updates all constituents linked to the address, linking them to the new preferred address.

10. To return to the Import Change of Address Request screen, click **OK**.

NetSolutions - Import Change of Address Requests

Import Change of Address Requests
Use this facility to match any change of address requests to Raiser's Edge constituents. Once all constituents are matched, click the "Import Now" button to import the information into the Raiser's Edge.

RE Constituent	Downloaded Information	Update Option
Sue Brady 33 Main St. Charleston, SC 29401 unknown: (843) 654-0987 Email: denise.kadilak@blackbau... Constit ID: 205	Ms. Sue Brady 25 Water St. Poland, OH 44514 Email: sue@aol.com Send Email: No	Add new preferred address
Mark D. Adamson 125 Smokerise Way Charleston, SC 29401 Home: 843-798-6698 Email: denise.kadilak@blackbau... Constit ID: 3	Mr. Mark Adamson 310 East Bay Charleston, SC 29401 Email: MarkAdam@aol.com Send Email: No	Update preferred address

Buttons: Delete Row..., Import Now, Cancel

11. Once you match the **Downloaded Information** with records in **The Raiser's Edge** and select update options, click **Import Now**. A screen appears, confirming the change of address information has been imported.

The Raiser's Edge

Change of Address requests have been imported.

OK

12. Click **OK**. The Import Change of Address Requests screen appears with all columns blank.

NetSolutions - Import Change of Address Requests

Import Change of Address Requests
Use this facility to match any change of address requests to Raiser's Edge constituents. Once all constituents are matched, click the "Import Now" button to import the information into the Raiser's Edge.

RE Constituent	Downloaded Information	Update Option

Buttons: Close

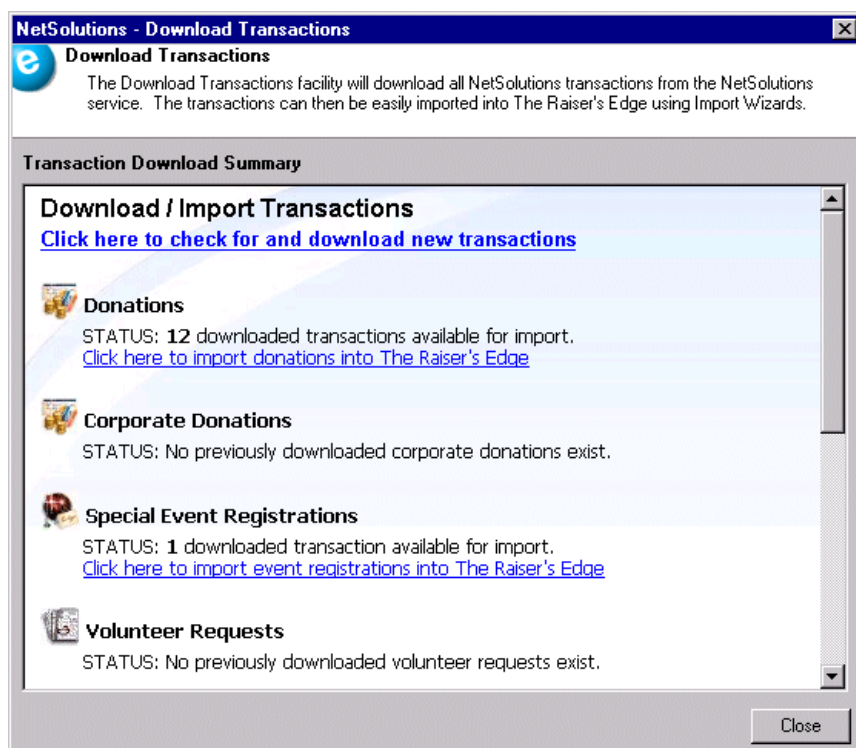
13. To return to the Download Transactions screen, click **Close**.

Downloading Email Opt-Out Information from your Web Site

If existing **Raiser's Edge** constituents visiting a *NetSolutions* Web page unmark the **I wish to receive future email correspondence** checkbox on the online Registration Information form, you can update their existing record with this information, using the **Download Email Opt-Outs** link. This link also downloads email opt-outs entered through messages sent using **NetMail**.

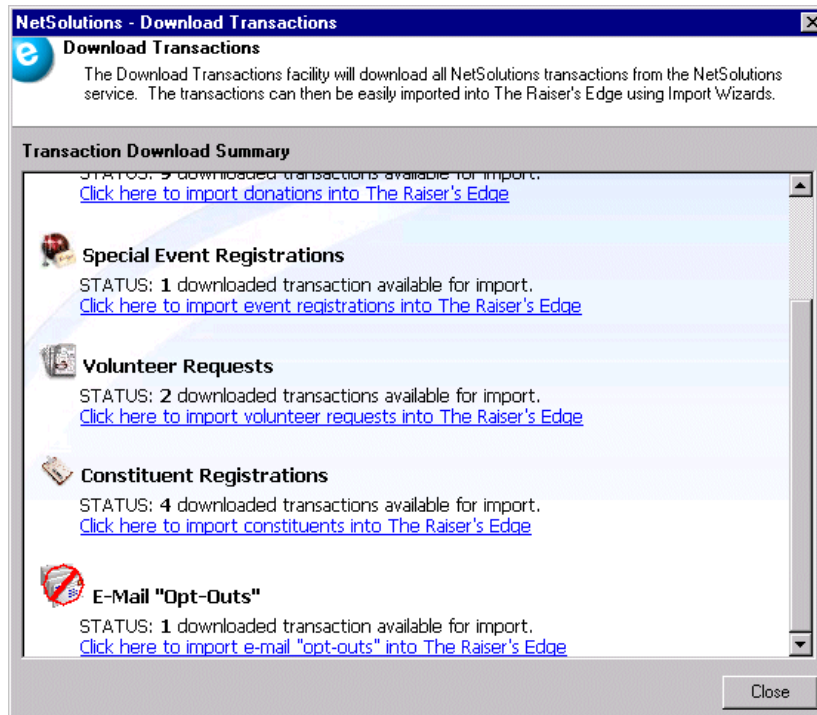
► Downloading email opt-out information from your Web site

1. On the Raiser's Edge bar, click **NetSolutions**. The NetSolutions page appears.
2. Click **Download Transactions**. The Download Transactions screen appears.



3. Click the **Click Here to check for and download new transactions** link. A screen appears, displaying the number of transactions downloaded.

4. Click **OK**. The Download Transactions screen appears, displaying a link to the downloaded transactions.

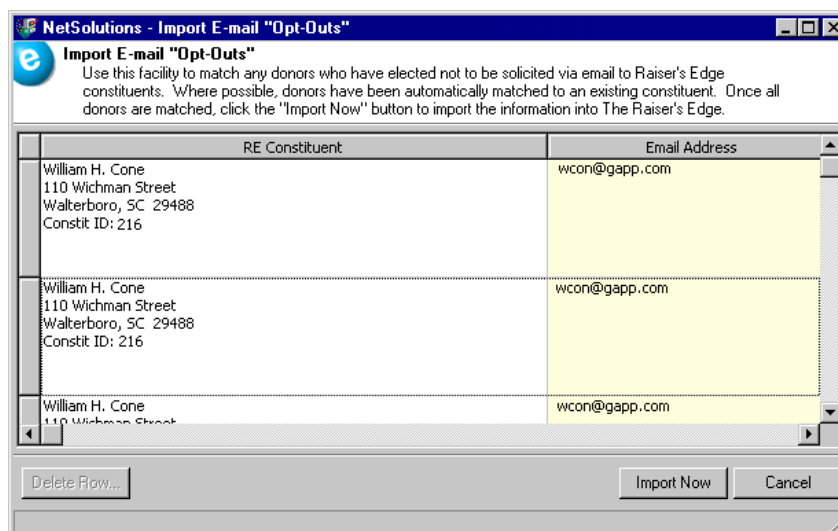


The information is arranged based on the Web page from which the transactions were downloaded.

5. Scroll down to the **Email “Opt-Outs”** heading at the bottom of the screen.

The screen displays how many online constituents unmarked the **I wish to receive future email correspondence** check mark on the online constituent Registration Information form. In the preceding example, one downloaded record has this checkbox unmarked.

6. Click the **Click here to import email opt-outs into The Raiser’s Edge** link under **Email “Opt-Outs”**. The Import Email “Opt-Outs” screen appears.



Note: The program does not overwrite downloaded transactions.

- The information downloaded appears. If constituent information defaults in the **RE Constituent** column, the program automatically matched the constituent with the email address.
- If the **RE Constituent** column is empty, you must manually locate the downloaded email with a constituent record in your database using the **RE Constituent** column.

To complete the **RE Constituent** column, place your cursor in the column. Press **F7** on your keyboard. The Open screen appears.

The constituent's name defaults into the name fields at the bottom of the screen. If a constituent record already exists, the name appears in the **Constituent Name** column.

Select the name and click **Open**.

- If the name does not already exist, click **Add New** to add the record.

You must then identify the new record as "Individual" or "Organization", and the New Individual/Organization screen appears.

Warning: Use caution when matching registrants with constituent records. Make sure the registrant is the constituent to whom you are linking the online donation.

All information included in the online record defaults into the new constituent record. Click **Save and Close** or add additional information. For more information about adding a constituent record, see the Constituent Records chapter of the *Constituent Data Entry Guide*.

7. When you click **Save and Close**. You return to the Import Email "Opt-Outs" screen. The constituent information now appears in the **RE Constituent** column.
8. Once you match the downloaded email addresses with records in *The Raiser's Edge*, click **Import Now**. The program imports the information.
9. To return to the Download Transactions screen, click **Close**.

Downloading Undeliverable Email Address Information

When working in **NetMail**, you can track all email messages returned to Blackbaud's server as undeliverable using the **Download Transactions** link in *NetSolutions*. There are two types of undeliverable email tracked by NetMail:

- A hard undeliverable email message is an email message returned to the sender because the recipient's address is invalid. This may occur because the domain name does not exist or because the recipient is unknown.
- A soft undeliverable email message is an email message that gets as far as the recipient's mail server but is deemed undeliverable before it gets to the intended recipient. This may occur because the recipient's inbox is full. A soft undeliverable message may be deliverable at another time or may be forwarded manually by the network administrator in charge of redirecting mail on the recipient's domain.

You can see which constituent email addresses failed, and you can also create a query of these records.

From **Download Transactions**, use the **Click here to import undeliverable email into The Raiser's Edge** link available under the **Undeliverable Email** frame at the bottom of the Transaction Download Summary screen. You can view the undeliverable email addresses, see the type of undeliverable (hard or soft), and create a query of the email information to use in other *Raiser's Edge* applications.

► Downloading undeliverable email address information

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

Note: *NetSolutions* downloads up to a maximum of 1,000 online transactions at a time. If, after downloading transactions, the **Status** fields on the Transaction Download Summary screen add up to 1,000 transactions, you may want to click the **Click here to check for and download new transactions** link a second time, to make sure you download all online data.

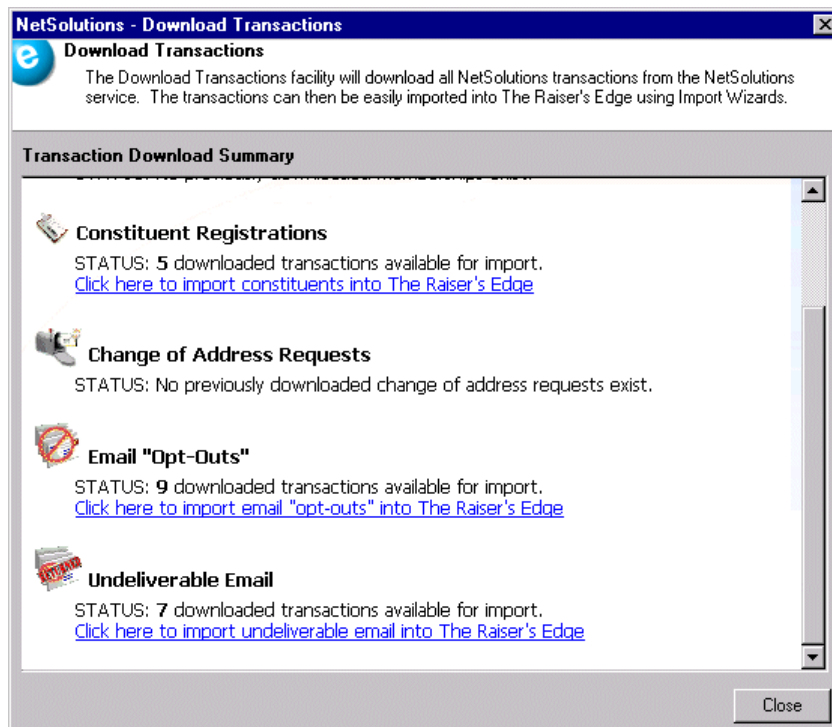
2. Click **Download Transactions**. The Download Transactions screen appears.



3. Click the **Click here to check for and download new transactions** link. A screen appears, displaying the number of transactions downloaded.
4. Click **OK**. The Download Transactions screen appears, displaying a link to the downloaded transactions. The information is arranged based on the Web page from which the transactions were downloaded.

Note: To help you track undeliverable email addresses, a note is automatically added on the Notes tab of the constituent record when you download undeliverable email information. The note includes the text of the returned message along with the date. You can remove this information using **Global Delete**. In the **Record type** field, select "Notepads - Constituents". On the Delete Options tab, move "NetMail" into the **Delete Notes with Types** box.

5. Scroll to the **Undeliverable Email** frame at the bottom of the screen.



Note: The **Type** column on the Undeliverable Email screen is editable, so you can change the entry based on the text of the message.

6. Click the **Click here to import undeliverable email into The Raiser's Edge** link under **Undeliverable Email**. The Import Undeliverable Email screen appears.

NetSolutions - Import Undeliverable Email

Undeliverable Email
Use this facility to match any undeliverable email to Raiser's Edge constituents. Click the "Create Queries" button to create static queries of the information in The Raiser's Edge.

RE Constituent	Email Address	Type	Subject	Message Text
Stella S. White 22-B Cooper Way Coffman Cove, AK 99918 Constit ID: 130	stellawhite@bell...	Hard	2008 Annual App...	This is an automatically generated D... Delivery to the following recipients f... stellawhite@bellnorth.com
Isabelle G. Matley 847 Candler Road Charleston, SC 29405 Constit ID: 52	mig@homeweb.c...	Soft	2008 Annual App...	This is an automatically generated D... Delivery to the following recipients f... mig@homeweb.com
David A. Underwood 154 Cedar Avenue Summerville, SC 29407 Constit ID: 84	david.underwoo...	Hard	2008 Annual App...	This is an automatically generated D... Delivery to the following recipients f... david.underwood@snt.net

Buttons: Delete Row..., Create Queries, Cancel

Note: For information about why the email message was undeliverable, hover your mouse over the email address in the download grid.

The information downloaded appears. If you have not changed the constituent information included in the export file used in your **NetMail** campaign, the information in the **Email Address** column is automatically matched with the **RE Constituent**, as shown in the previous picture.

7. If you changed information in your constituent records and that information is used in the **NetMail** export file, the program cannot automatically match the undeliverable **Email Address** with the **RE Constituent**, as shown in the picture below.

NetSolutions - Import Undeliverable Email

Undeliverable Email
Use this facility to match any undeliverable email to Raiser's Edge constituents. Click the "Create Queries" button to create static queries of the information in The Raiser's Edge.

RE Constituent	Email Address	Type	Subject	Message Text
	stellawhite@bell...	Hard	2008 Annual App...	This is an automatically generated D... Delivery to the following recipients f... stellawhite@bellnorth.com
	mig@homeweb.c...	Soft	2008 Annual App...	This is an automatically generated D... Delivery to the following recipients f... mig@homeweb.com
	david.underwoo...	Hard	2008 Annual App...	This is an automatically generated D... Delivery to the following recipients f... david.underwood@snt.net

Buttons: Delete Row..., Create Queries, Cancel

To create queries with this information, you must manually match the email address with a constituent record in your database, create a new record with the email address, or delete the address from the Undeliverable Email screen.

To manually match the email address with a constituent record in your database, place your cursor in the **RE Constituent** column next to the **Email Address**. Press **F7** on your keyboard. The Open screen appears.

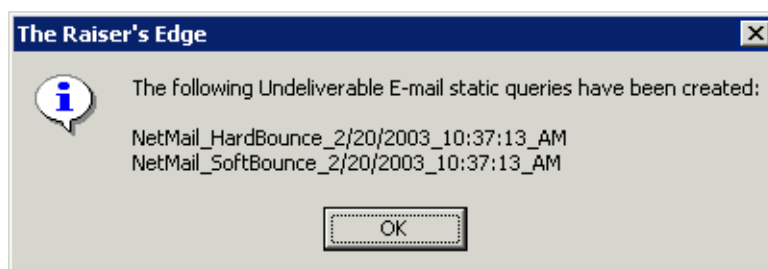
If you know the constituent record to which the undeliverable email address belongs, enter the information you know in the criteria fields at the bottom of the Open screen, click **Find Now**, select the record in the grid, and click **Open**. You return to the Import Undeliverable Email screen. The **RE Constituent** column is now complete. Also, if this email address appears more than once on the Import Undeliverable Email screen, the **RE Constituent** column fills in for all instances.

If you do not know the constituent record to which the undeliverable email address belongs, you must create a new constituent record or delete the email address.

- To create a new record, click **Add New**. A new constituent record screen appears.
- To delete the email address, on the Import Undeliverable Email screen, select the row, and click **Delete Row**. A confirmation screen appears. Click **Yes** to delete the row.

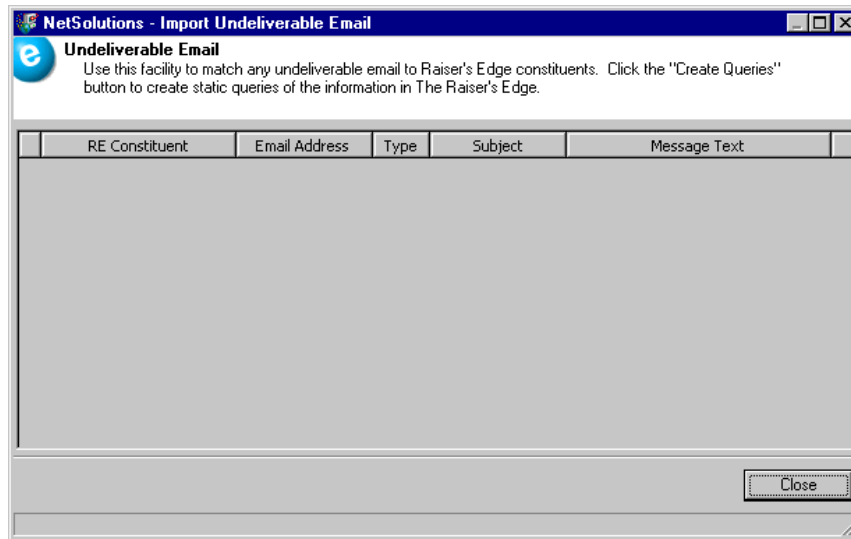
After all the undeliverable email addresses are matched with a constituent record, create a query. You can use the query in other *Raiser's Edge* application, such as **Global Change**, to replace the undeliverable email addresses; **Global Delete**, to delete these records from your database; or in a *Mail* task, to send a hardcopy appeal to these constituents.

8. To create a query, click **Create Queries**. The program processes the request and creates two queries: one with hard undeliverable email addresses and one with soft undeliverable email addresses.



When the confirmation screen appears, take note of the query names. You will need the name to open the query file later in *Query*.

- Once you have the query names, click **OK**. You return to a blank Import Undeliverable Email screen.



- To return to the Download Transactions screen, click **Close**.

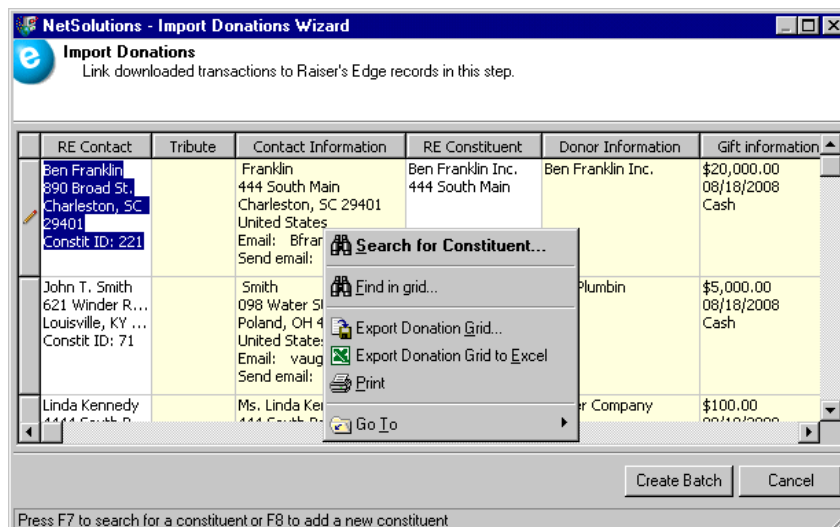
Exporting Downloaded Data to Excel

From any of the download grids, you can export downloaded data to a Microsoft *Excel* spreadsheet. This is helpful if members of your organization without access to *NetSolutions* need to review the downloaded information.

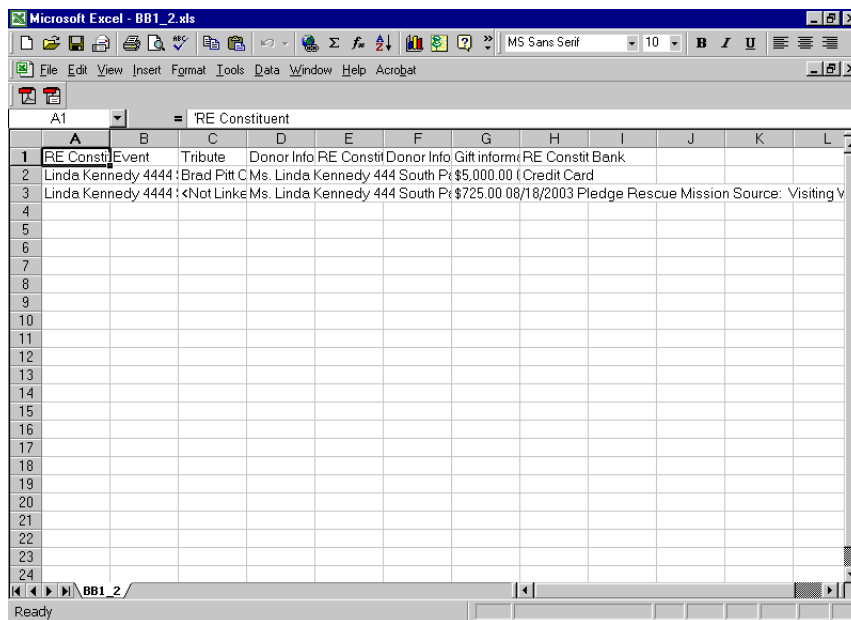
The following procedure is based on exporting donations data downloaded from an **NetDonors** Web page to *Excel*. The same procedure applies to all download options in **Download Transactions**.

► Exporting downloaded data to Excel

- For example, to export donations downloaded from your **NetDonors** Web page, open the Import Donation Wizard by clicking **Click here to import donation into The Raiser's Edge** on the Download Transactions screen.
- Right-click anywhere within the download grid. The right-click menu appears.



3. Select **Export <Donation> Grid to Excel**.
4. The program processes the export and the downloaded data appears in an *Excel* spreadsheet.



Exporting Downloaded Data

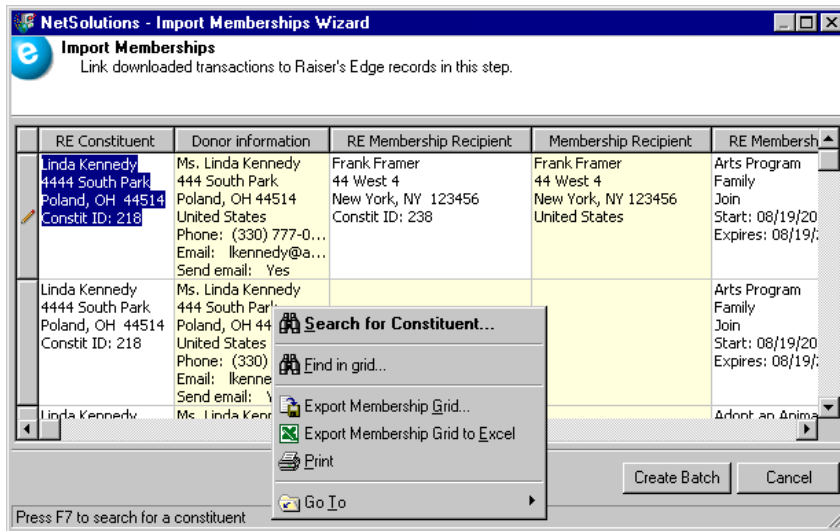
From any of the download grids, you can export downloaded data to an outside application, such as Microsoft *Word* or *Notepad*. This is helpful if members of your organization without access to *NetSolutions* need to review the downloaded information.

The following procedure is based on exporting data downloaded from an **NetMembers** Web page to a format that can be access from *Notepad*. The same procedure applies to all download options in **Download Transactions**.

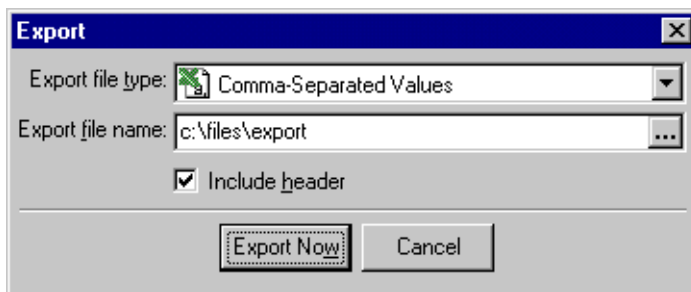
► Exporting downloaded data

1. For example, to export donations downloaded from your **NetMembers** Web page, open the Import Membership Wizard by clicking **Click here to import memberships into The Raiser's Edge** on the Download Transactions screen.

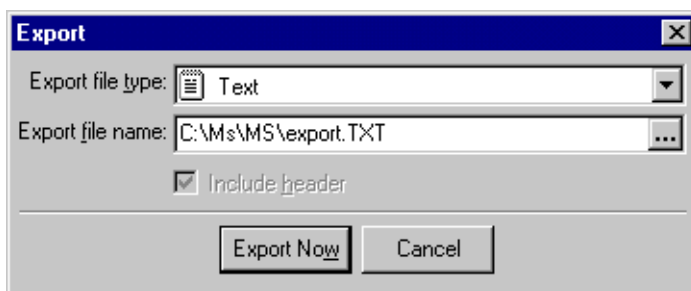
2. Right-click anywhere within the download grid. The right-click menu appears.



3. Select **Export <Membership> Grid**. The Export screen appears.

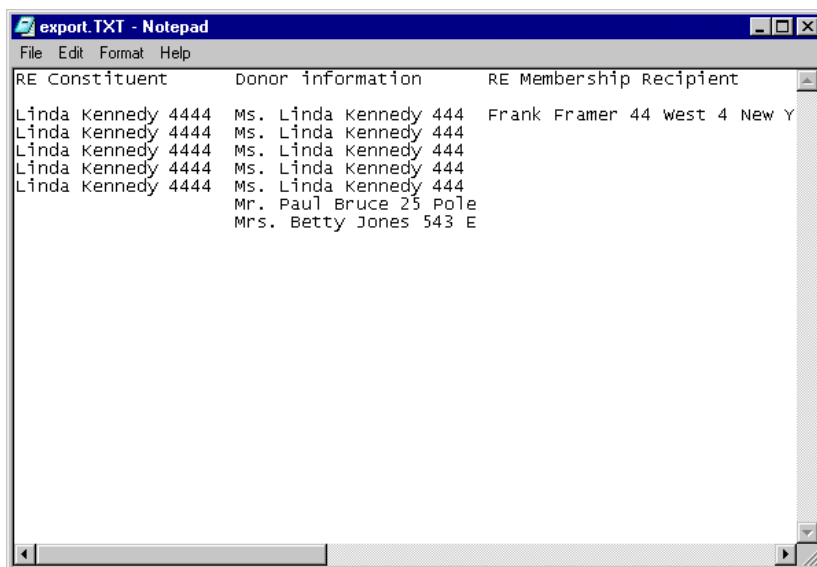


4. In the **Export file type** field, select an export format. This determines the way the data exported from your database appears in the data file and with which application it is used. There are several export formats that work with *The Raiser's Edge*: Text, Microsoft Access, Character Separated Value, Comma Separated Value. For a complete list and description of the formats, see the Export Formats section of the Export chapter in the *Query & Export Guide*.
5. In the **Export file name** field, browse to where you want the exported information saved.



6. Click **Export Now**. The program processes the export and saves the file in the selected location.

7. To access the exported data, open the outside application with which to work. In this example, we used *Notepad*. Map to the location of the saved export file.



8. Open the saved export file.

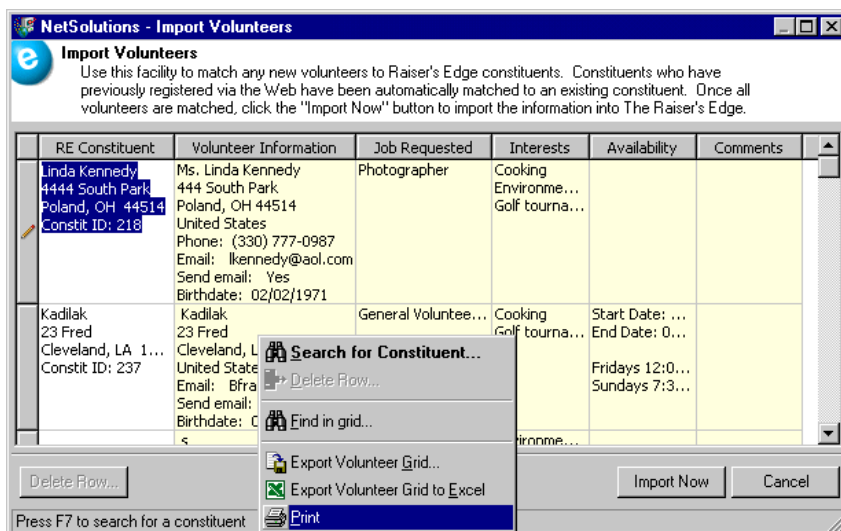
Printing Downloaded Data

From any of the download grids, you can print downloaded data. This is helpful if members of your organization want to review the information before creating the batch file.

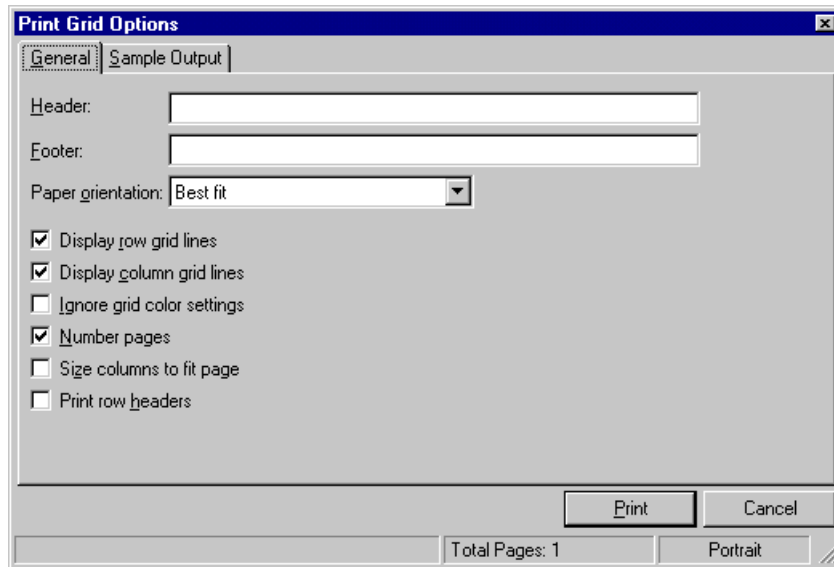
The following procedure is based on printing data downloaded from an **NetVolunteers** Web page. The same procedure applies to all download options in **Download Transactions**.

► Printing downloaded data

1. For example, to print data downloaded from a **NetVolunteers** Web page, open the Import Volunteers by clicking **Click here to import volunteers into The Raiser's Edge** on the Download Transactions screen.
2. Right-click anywhere within the download grid. The right-click menu appears.



3. Select **Print**. The Print Grid Options screen appears.



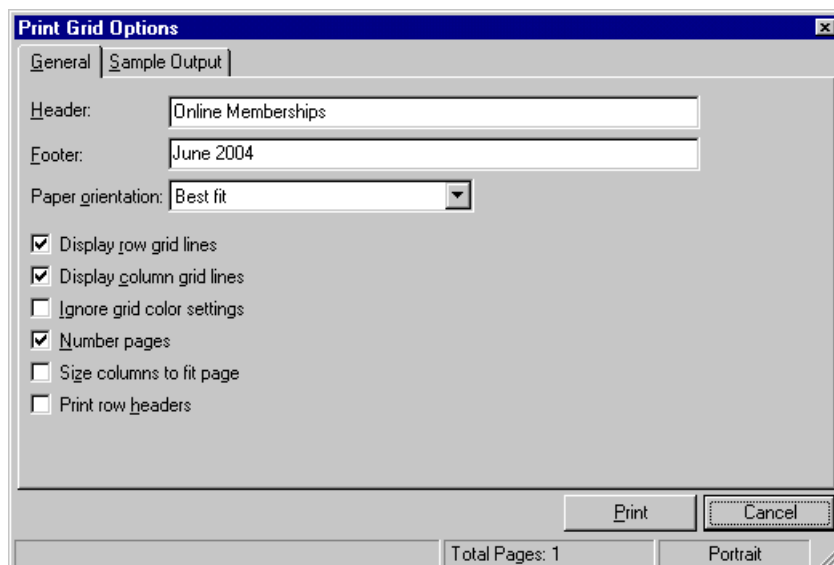
The 'Print Grid Options' dialog box is shown with the 'General' tab selected. It contains fields for 'Header' and 'Footer', a 'Paper orientation' dropdown menu set to 'Best fit', and a list of checkboxes for printing options. The 'Print' button is highlighted.

Field	Value
Header:	
Footer:	
Paper orientation:	Best fit
Display row grid lines	☒
Display column grid lines	☒
Ignore grid color settings	☐
Number pages	☒
Size columns to fit page	☐
Print row headers	☐

Buttons: Print, Cancel

Total Pages: 1, Portrait

4. In the **Header** field, enter a heading to appear at the top of you report.
5. In the **Footer** field, enter the information to appear at the bottom of each report page.
6. In the **Paper orientation** field, select the paper orientation for you report: Portrait, Landscape, Use printer default, or Best fit.
7. The series of checkboxes at the bottom of the screen offer additional printing options. Mark any or all of the options:
- **Display row grid lines**
 - **Display column grid lines**
 - **Ignore grid color settings**
 - **Number pages**
 - **Size columns to fit page**
 - **Print row headers**



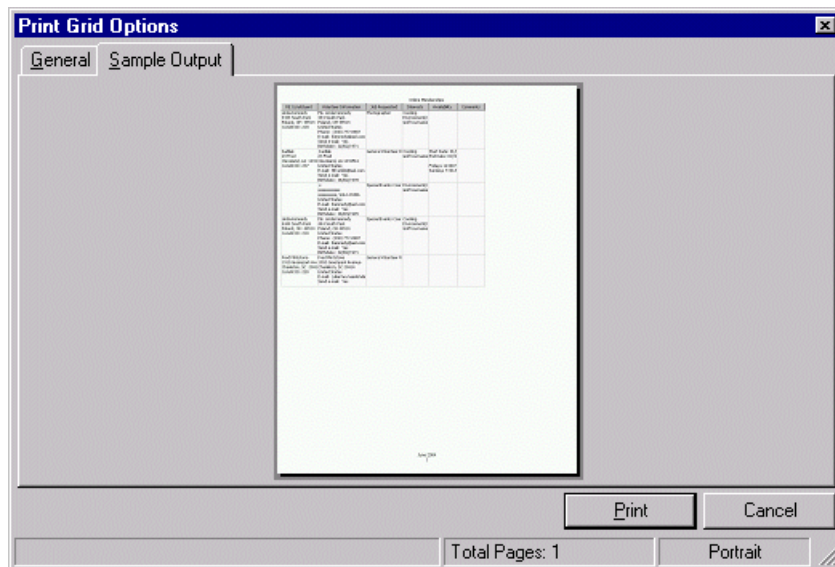
The 'Print Grid Options' dialog box is shown with the 'General' tab selected. The 'Header' field is filled with 'Online Memberships' and the 'Footer' field is filled with 'June 2004'. The 'Paper orientation' dropdown menu is set to 'Best fit'. The checkboxes for 'Display row grid lines', 'Display column grid lines', 'Number pages', and 'Print row headers' are checked. The 'Print' button is highlighted.

Field	Value
Header:	Online Memberships
Footer:	June 2004
Paper orientation:	Best fit
Display row grid lines	☒
Display column grid lines	☒
Ignore grid color settings	☐
Number pages	☒
Size columns to fit page	☐
Print row headers	☒

Buttons: Print, Cancel

Total Pages: 1, Portrait

8. Select the Sample Output tab to preview the report layout before printing.



9. Click **Print** to print a hardcopy of your downloaded data.

Searching Download Grid

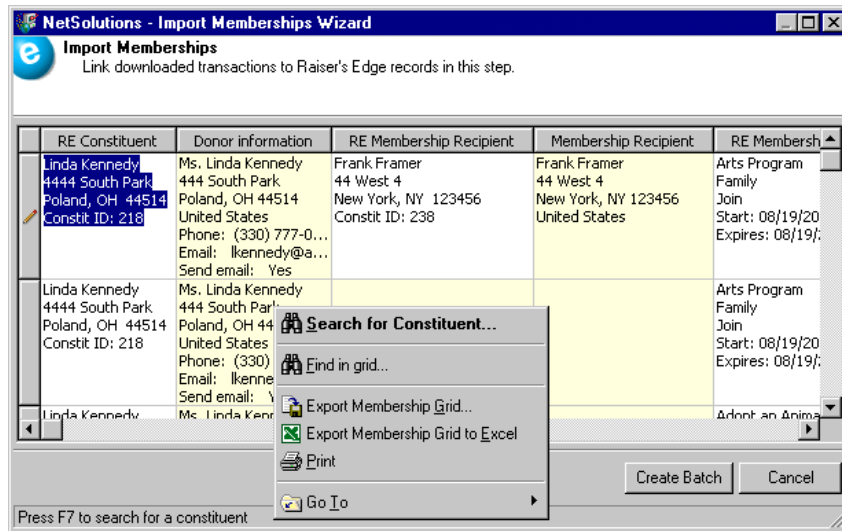
The **Find in grid** menu option helps you locate information you need quickly. For example, if you downloaded a large number of online memberships and want to find a new arts program member, you can use the **Find in grid** menu option.

The following procedure is based on searching data downloaded from an **NetMembers** Web page. The same procedure applies to all download options in **Download Transactions**.

► Searching downloaded data

1. For example, to search data downloaded from your **NetMembers** Web page, open the Import Membership Wizard by clicking **Click here to import memberships into The Raiser's Edge** on the Download Transactions screen.

2. Right-click anywhere within the download grid. The right-click menu appears.



3. Select **Find in grid**. The Find screen appears.



4. In the **Field** field, select what section of the downloaded data grid to search. For example, if you are looking for a specific constituent, that information is stored in the **RE Constituent** column of the grid. So you would select, "RE Constituent".
5. In the **Find what** field, enter the specific information to find. For example, to find Ben Smith, enter any part of his name.
6. In the **Match field**, enter how much of the text you entered in the **Find what** field must match before a record is selected. For example, if you are not sure of the constituent's entire name, select "Any part of field". The program will then display any records found with the either the word "Ben" or "Smith".
7. Mark **Match case** to make your search case-sensitive.
8. Click **Find First** to locate the first record satisfying your criteria.
9. If you fail to find the record you are looking for, click **Find Next**.

Customizing Confirmations



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With the **Customize Layout** button available in several *NetSolutions* modules, you can personalize confirmation messages sent via email to online visitors to your various Web pages. A **Preview Confirmation** button, also available, allows you to view your message before committing it to the Blackbaud server. The two buttons are available in the following areas: **NetDonors**, **NetEvents**, **NetVolunteers**, and **NetMembers**.

This chapter shows you how to create a customized confirmation/message. Although the procedure uses the **NetDonors** Donation Page Wizard to illustrate the process, the procedure applies to **NetDonors**, **NetEvents**, **NetVolunteers**, and **NetMembers**. Only the location of the **Customize Layout** and **Preview Confirmation** buttons vary between the modules:

- In **NetDonors**, the buttons are located on the Miscellaneous screen of the Donation Page Wizard. For information about the Donation Page Wizard, see “Designing your NetDonors Page” on page 62.
- In **NetEvents**, the buttons are located on the Customize the event confirmation screen of the Web Event Wizard. For information about the Web Event Wizard, see “Publishing an Event to Your Web Site” on page 140.
- In **NetVolunteers**, the buttons are located on the Miscellaneous screen of the Web Job Wizard and the General volunteer page options screen of the Volunteer Sign-up Page Wizard. For more information about the Web Job Wizard, see “Publishing a Job to Your Web Site” on page 236. For more information about the Volunteer Sign-up Page Wizard, see “Publishing a Volunteer Registration Form to Your Web Site” on page 223.
- In **NetMembers**, the buttons are located on the Customize the membership confirmation message screen of the Web Members Wizard. For more information about the Web Members Wizard, see “Publishing Membership Information on Your Web Site” on page 262.

Composing a Message

You can edit the default confirmation/message included in *NetSolutions*. You can delete the entire message and start over, you can delete sections, and you can add sections. The process is similar to creating a message for a mail merge within Microsoft *Word*.

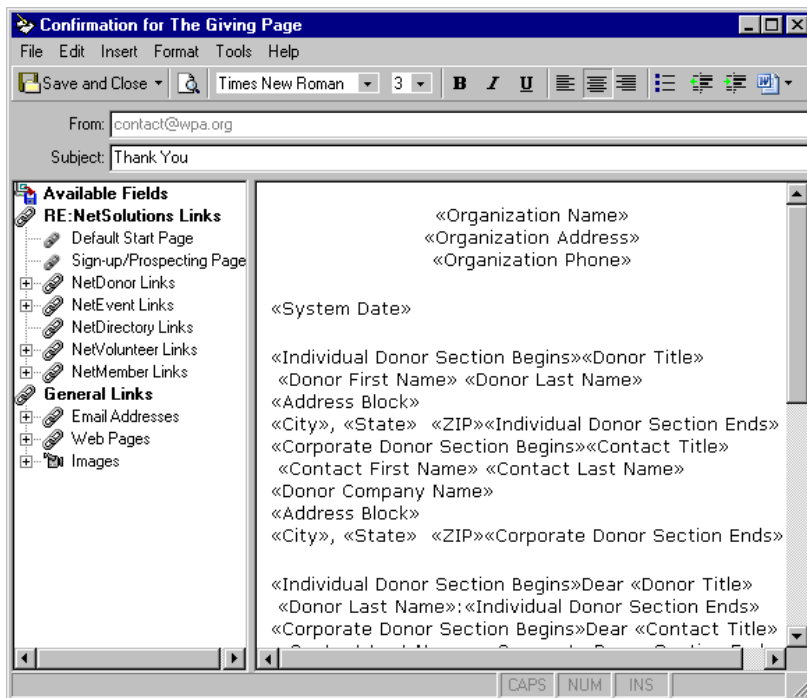
The default message includes fields and text for messages sent to individual constituents and fields and text for message sent to corporate constituents. Using your cursor, you can change either message. You can also enter who sent the message and include a subject for the email message.

There is a 2,147,483,647 character limitation.

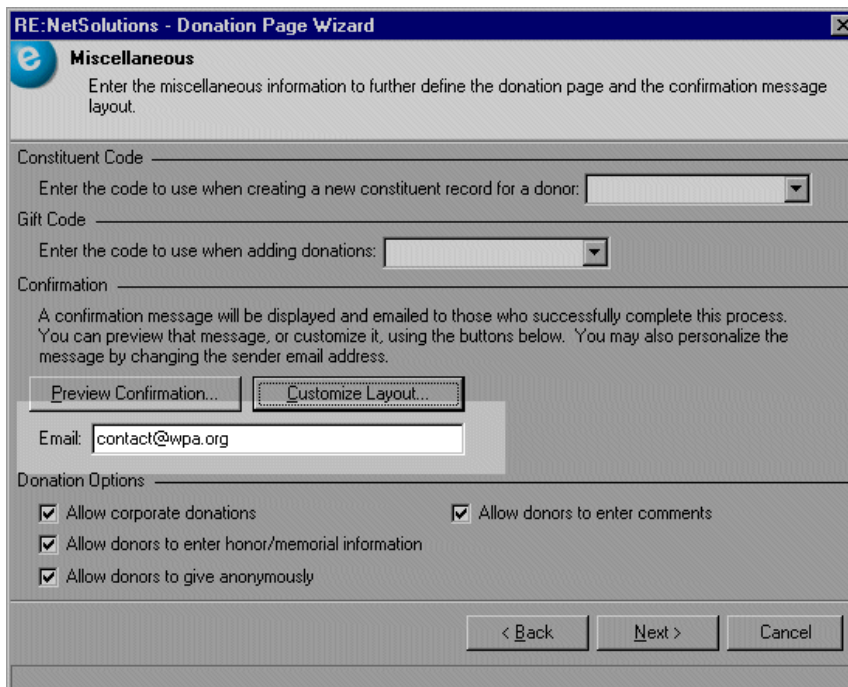
► Composing confirmations/messages

Note: The background image specified in Configure and Customize or the background image specified in Page Design will be used for the default background in the HTML view of your Confirmation Message.

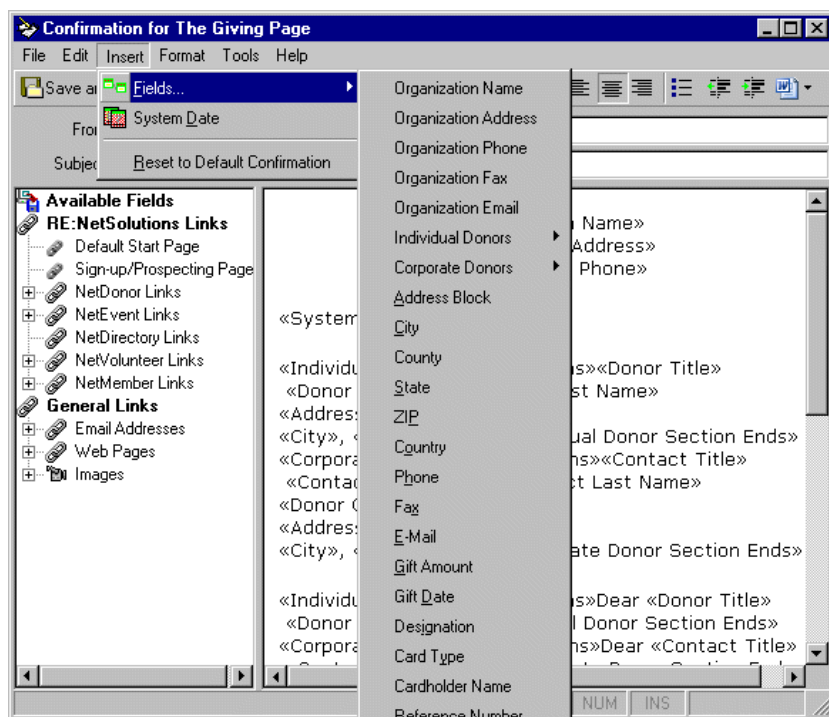
1. From **NetDonors**, **NetEvents**, **NetVolunteers**, or **NetMembers**, click the **Customize Layout** button. The Confirmation screen appears.



2. In the **From** field, the email address entered in the **Email** field of the wizard screen defaults. This is the same email address you entered in **Configure and Customize**.
For example, in **NetDonors**, the **Email** field is under the **Customize Layout** button on the Miscellaneous screen of the Donation Page Wizard.



3. In the **Subject** field of the Confirmation screen, enter the purpose of the email. This displays in the **Subject** field of the sent email message.
4. A default message appears in the right pane of the Confirmation screen. On the Confirmation screen, in the right pane, all of the fields used to compose the default confirmation/message appear. To delete any field or text you do not want, highlight it with your cursor, and press **DELETE** on your keyboard.
5. To add a **Raiser's Edge** field, place your cursor in the right pane in the location you want to add a field. Select **Insert, Fields** from the menu bar.



Note: Alternatively, to include **Raiser's Edge** fields in your email message using the left pane, double-click the **Available Fields** category. A list of all fields you can include in your message appears. Double-click on the field to move into the right pane.

Select the field you want to add, and you return to the Confirmation screen.

6. If you remove or add fields and then find you want the default message back, select **Insert, Reset to Default Confirmation** from the menu bar.
7. You must distinguish between individual and corporate donors when composing your email message.
 - When adding fields or text specific to your individual donors, you must include the <Individual Donor Section Begins> tag.
 - When ending fields or text specific to your individual donors, you must include the <Individual Donor Section Ends> tag.
 - For corporate information, use the <Corporate Donor Section Begins> and <Corporate Donor Section Ends> tags.

For example, to include the donor's address in the confirmation/message and you accept both individual and corporate donations online, you must create two separate address blocks in the right message pane.

- a. In the first address block, add the <Individual Donor Section Begins> tag.
- b. Then add all of the **Raiser's Edge** fields you want to include in the address block: <Donor Title>, <Donor First Name>, <Donor Last Name>, etc.

- c. When you finish adding address block fields, add the <Individual Donor Section Ends> tag. Your message will look similar to the following:

```
<Individual Donor Section Begins><Donor Title> <Donor First Name>
<Donor Last Name>
<Address Block>
<City>, <State> <ZIP><Individual Donor Section Ends>
```

8. To include the address for corporate donors, repeat the process above, only use the <Corporate Donor Section Begins> and <Corporate Donor Section Ends> tags.
9. You must distinguish between corporate and individual donors when composing the salutation. A salutation section for both corporate and individual donors, may look similar to the following:
- ```
<Individual Donor Section Begins>Dear <Donor Title> <Donor Last
Name>:<Individual Donor Section Ends><Corporate Donor Section
Begins>Dear <Contact Title> <Contact Last Name>:<Corporate Donor Section
Ends>
```
10. Type the body text of your message wherever you want it to appear in the message. You can also include any *Raiser's Edge* fields available from the **Insert, Fields** menu or in the **Available Fields** category in the left pane.

For example, to include gift information, your message may look similar to the following:

Thank you for your generous «Gift Type» of «Gift Amount».

On the actual message, this may read:

Thank you for your generous cash gift of \$50.

If you want to also include a recognition of the company responsible for the gift in any message sent to corporate donors, your message would look similar to the following:

Thank you for your generous «Gift Type» of «Gift Amount»«Corporate Donor Section Begins» on behalf of «Donor Company Name»«Corporate Donor Section Ends».

On the actual message, this may read:

Thank you for your generous cash gift of \$50 on behalf of the XYZ Company.

**Warning:** If you change the font type, size, or style settings of the body text after submitting a page to Blackbaud, the changes are not reflected in the custom confirmation unless you open the confirmation and select **Insert, Reset to Default Confirmation** from the menu bar. However, if you change the font color of your body text, the color of any text in the confirmation does change.

11. Once you complete your message, you can add links to various Web pages, email contact information, a change of address link. If you are done with your message, click **Save and Close** to return to the wizard screen.

## Previewing a Message

You can preview the confirmation message on the same wizard screen that enables you do edit it.

You can see what the message sent by *NetSolutions* will look like by using the **Preview Confirmation** button. In the Preview Confirmation screen you can see HTML and Plain Text versions of your message, in addition to viewing versions of the message sent to both individual and corporate donors. You can also toggle the view of the tribute section.



### ► Previewing a Confirmation Message

1. To preview a confirmation message from **NetDonors**, **NetEvents**, **NetVolunteers**, or **NetMembers**, click the **Preview Confirmation** button on the wizard screen.

Gift Code —

Enter the code to use when adding donations:

Confirmation —

A confirmation message will be displayed and emailed to those who successfully complete this process. You can preview that message, or customize it, using the buttons below. You may also personalize the message by changing the sender email address.

Email:

Donation Options —

☒ Allow corporate donations ☒ Allow donors to enter comments

☒ Allow donors to enter honor/memorial information ☒ Allow donors to give anonymously

2. The Preview Confirmation screen appears.

**Preview Receipt**

HTML Format Preview | Text Format Preview

[Show Corporate Donor Section](#)  
[Toggle Tribute Section](#)

Sample Organization  
24 Philanthropy Avenue  
Charleston, SC 29400  
(843) 555-9943

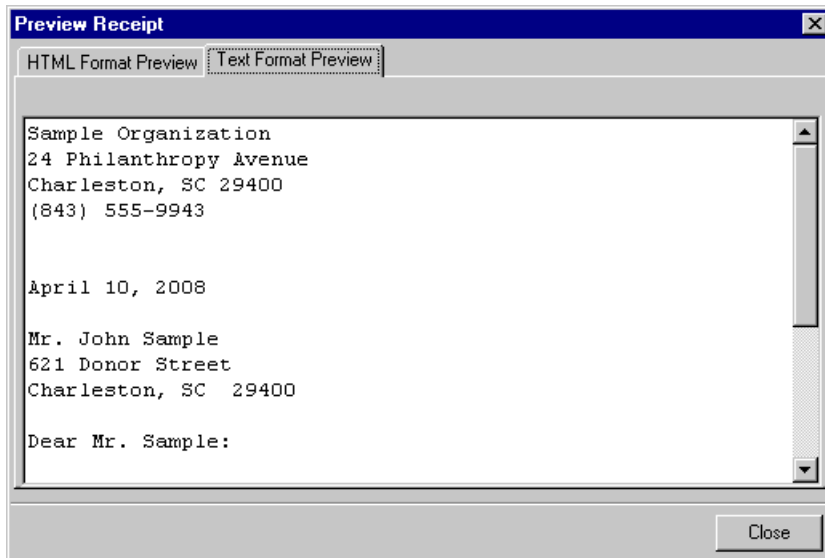
April 10, 2008

Mr. John Sample

The default confirmation/message includes one message for individual donors and another for corporate donors.

- To view the corporate donor message, click **Show Corporate Donor Section** at the top to the preview screen.
- To toggle the view of the tribute section, click **Toggle Tribute Section**.

- To view the message in text format, select the Text Format Preview tab.



3. Click **Close** to close this screen and return to the wizard screen.

## Adding Links to Your Message

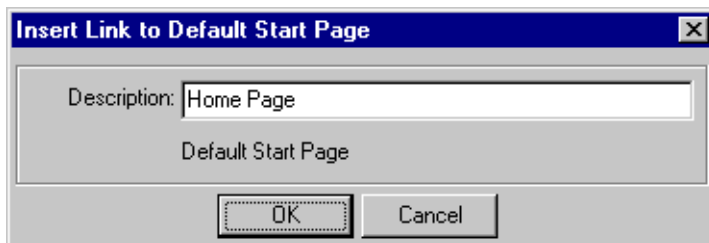
When customizing your *NetSolutions* confirmations/messages, you can include a number of links, taking recipients to your various *NetSolutions* Web pages, your organization's email contact, non-*NetSolutions* Web pages, and more.

### Default Start Page

You can include a link in your message to the Blackbaud-hosted Home page. This page includes links to all your *NetSolutions* Web pages.

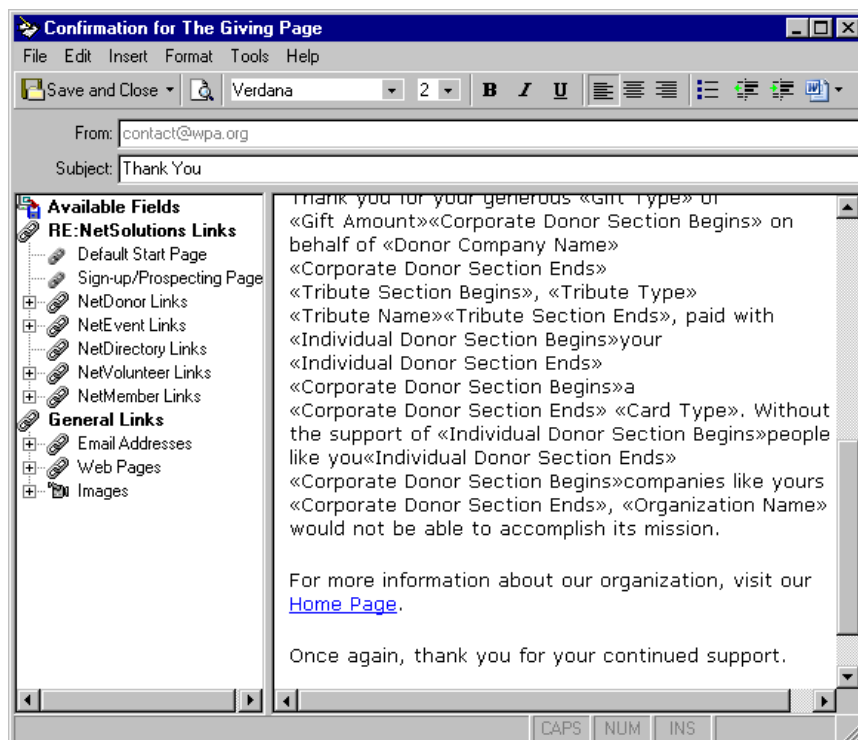
#### ► Adding a link to your Blackbaud-hosted Home page

1. From **NetDonors**, **NetEvents**, **NetVolunteers**, or **NetMembers**, click the **Customize Layout** button. The Confirmation screen appears.
2. From the Confirmation screen, place your cursor in the right message pane in the location you want to add a Home page link.
3. In the left pane tree view, double-click **Default Start Page**. The Insert Link to Default Start Page screen displays.



4. In the **Description** field, enter what you want the link to say in your email message.

5. Click **OK**. The new link displays in your message.



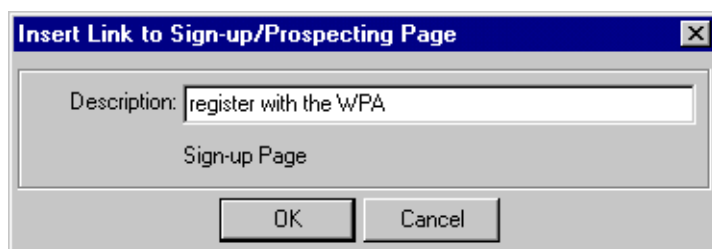
6. After you add all the links and images you want to include in your message, click **Save and Close** to save your message and return to the wizard screen.

## Sign-up/Prospecting Page

You can include a link in your message to your online registration page.

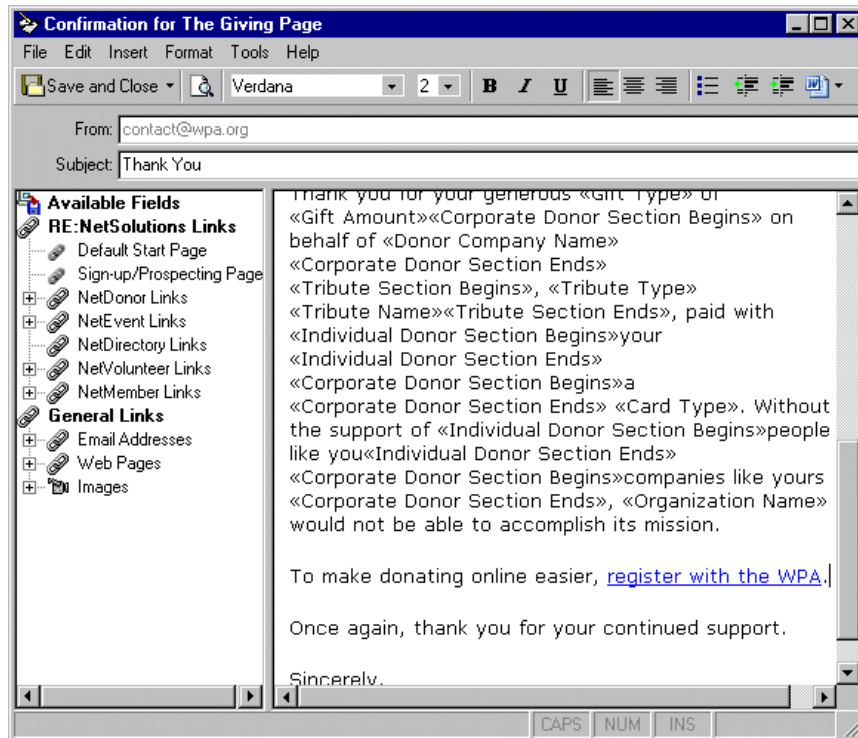
### ► Adding a link to your online registration page

1. From **NetDonors**, **NetEvents**, **NetVolunteers**, or **NetMembers**, click the **Customize Layout** button. The Confirmation screen appears.
2. From the Confirmation screen, place your cursor in the right message pane in the location you want to add an online registration page link.
3. Double-click **Sign-up/Prospecting Page** in the tree view. The Insert Link to Sign-up/Prospecting Page displays.



4. In the **Description** field, enter what you want the link to say in your email message. For example, enter "register with the WPA".

5. Click **OK**. The new link displays in your message.



6. After you add all the links and images you want to include in your message, click **Save and Close** to save your message and return to the wizard screen.

## NetDonor Links

You can include a link in your message to the online donation page you created in **NetDonors**.

### ► Adding a link to your donation page

1. From **NetDonors**, **NetEvents**, **NetVolunteers**, or **NetMembers**, click the **Customize Layout** button. The Confirmation screen appears.
2. From the Confirmation screen, place your cursor in the right pane in the location you want to add a donation page link.
3. Double-click **NetDonor Links** in the left pane tree view. All available donation pages appear under **NetDonor Links**.

4. Double-click the page to which you want to create a link. The Insert Link to NetDonor Page screen displays.

**Insert Link to NetDonor Page**

Description:

Giving page:

Campaign:

Fund:

Appeal:

Package:

☒ Update number solicited for this appeal

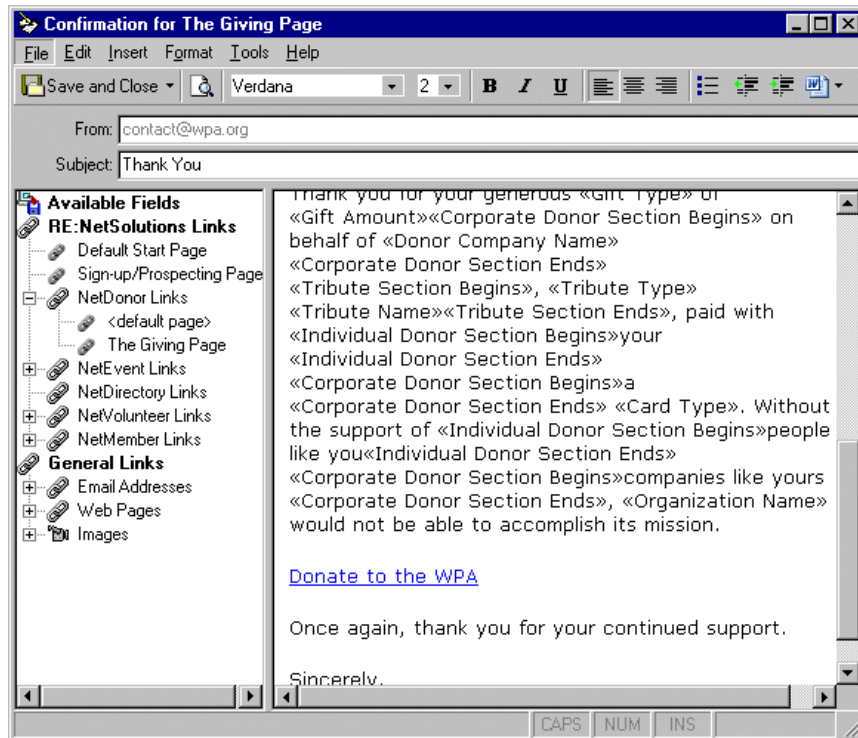
☒ Add this appeal to the constituent's record

Date:

Comment:

5. In the **Description**, field, enter what you want the link to say in your message. In the proceeding example, the donor will click on the words "Donate to the WPA" to access your donation page.
6. Enter the **Campaign, Fund, Appeal**, and/or **Package** you want credited for any donations.
7. For record keeping and reporting purposes, keep an up-to-date count of the number of constituents sent this message by marking the **Update number solicited for this appeal** checkbox. This information is helpful when trying to evaluate the success of the email effort. When you download your online transactions, the **No. solicited** field on the General tab of the appeal record is updated.
8. If the email is an appeal and your organization is in the habit of tracking appeals on constituent records, mark **Add this appeal to the constituent's record**. Enter the **Date** you want to appear with the appeal and any **Comment**.

9. Click **OK**. The new link displays in your message.



10. After you add all the links and images you want to include in your message, click **Save and Close** to save your message and return to the wizard screen.

## NetEvent Links

You can include a link in your message to the online event page(s) you created in **NetEvents**.

### ► Adding a link to your event page

1. From **NetDonors**, **NetEvents**, **NetVolunteers**, or **NetMembers**, click the **Customize Layout** button. The Confirmation screen appears.
2. From the Confirmation screen, place your cursor in the right pane in the location you want to add an event page link.
3. Double-click **NetEvents Links** in the left pane tree view. All available event pages appear under **NetEvents Links**.

4. Double-click the page to which you want to create a link. The Insert Link to NetEvent Page screen displays.

**Insert Link to NetEvent Page**

Description: Spring Ball

Event Page: Spring Ball

Campaign: Annual Campaign

Fund: 2008 Annual Fund

Appeal:

Package:

☐ Update number solicited for this appeal

☐ Add this appeal to the constituent's record

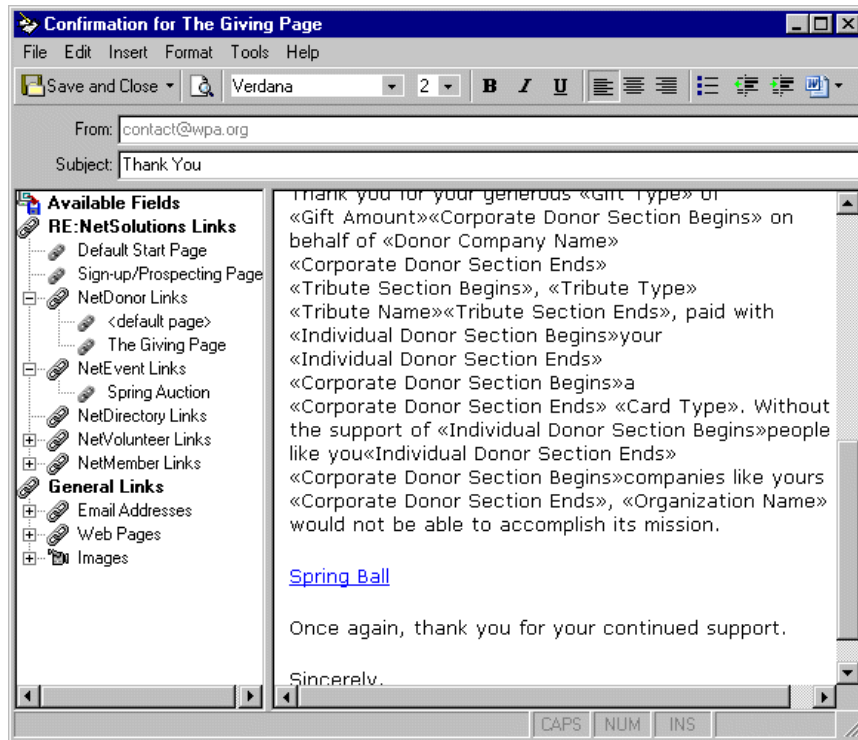
Date:

Comment:

OK Cancel

5. In the **Description** field, enter what you want the link to say in your message. In the above example, the donor will click on the words "Spring Ball" to access your online event page.
6. Enter the **Campaign, Fund, Appeal**, and/or **Package** you want credited for any donation.
7. For record keeping and reporting purposes, keep an up-to-date count of the number of constituents sent this message by marking the **Update number solicited for this appeal** checkbox. This information is helpful when trying to evaluate the success of the email. When you download your online transactions, the **No. solicited** field on the General tab of the appeal record is updated.
8. If the email is an appeal, and your organization is in the habit of tracking appeals on constituent records, mark **Add this appeal to the constituent's record**. Enter the **Date** you want to appear with the appeal and any **Comment**.

9. Click **OK**. The new link displays in your message.



10. After you add all the links and images you want to include in your message, click **Save and Close** to save your message and return to the wizard screen.

## NetDirectory Link

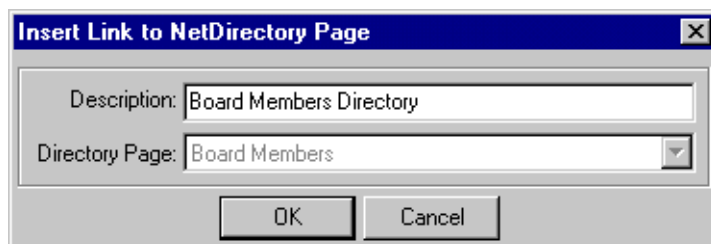
You can include a link in your message to the online directory page(s) you created in **NetDirectories**.

### ► Adding a link to your directory page

1. From **NetDonors**, **NetEvents**, **NetVolunteers**, or **NetMembers**, click the **Customize Layout** button. The Confirmation screen appears.
2. From the Confirmation screen, place your cursor in the right pane in the location you want to add a directory page link.
3. Double-click **NetDirectory Links** in the left pane tree view. All available directory pages appear under **NetDirectory Links**.

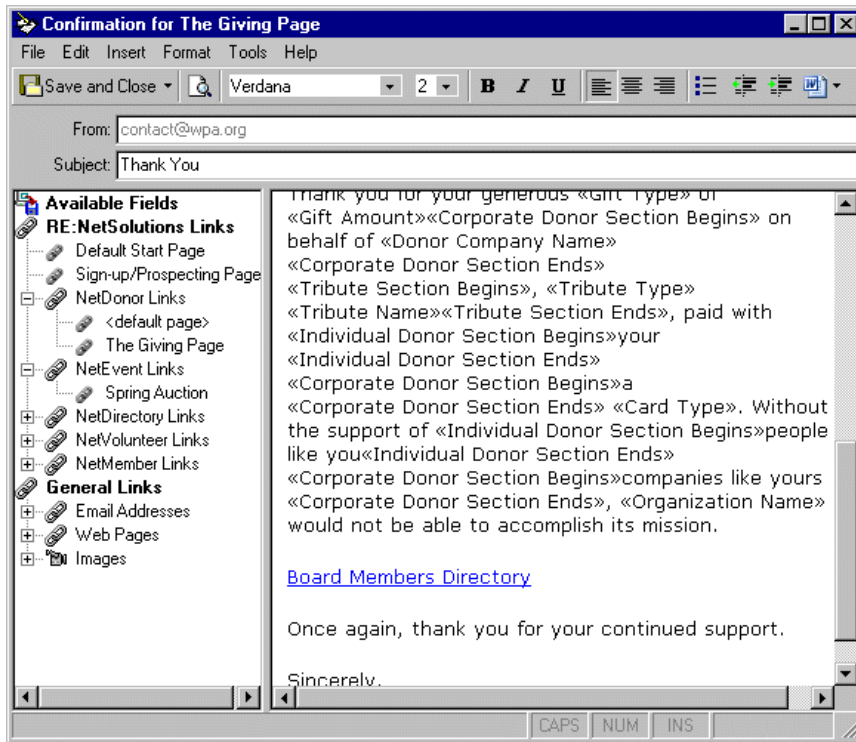
**Note:** For more information about online directories, see “NetDirectories” on page 165.

4. Double-click on the directory page to which you want to create a link. The Insert Link to NetDirectory Page screen displays.





5. In the **Description** field, enter what you want the link to say in your message. In the previous example, the donor will click on the words “Board Members Directory” to access the online directory.
6. The **Directory Page** field, displays the online directory to which this description is linked.
7. Click **OK**. The new link displays in your message.



8. After you add all the links and images you want to include in your message, click **Save and Close** to save your message and return to the wizard screen.

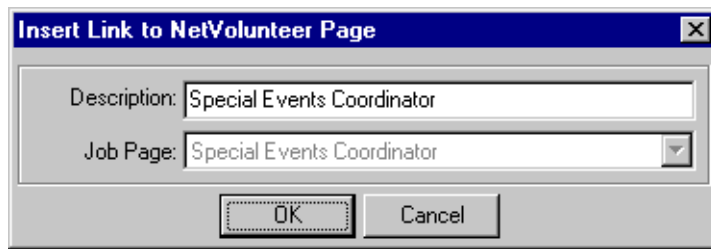
## NetVolunteers Link

You can include a link in your message to the online job page you created in **NetVolunteers**.

### ► Adding a link to your job page

1. From **NetDonors**, **NetEvents**, **NetVolunteers**, or **NetMembers**, click the **Customize Layout** button. The Confirmation screen appears.
2. From the Confirmation screen, place your cursor in the right pane in the location you want to add a job page link.
3. Double-click **NetVolunteer Links** in the left pane tree view. All available job pages appear under **NetVolunteer Links**.

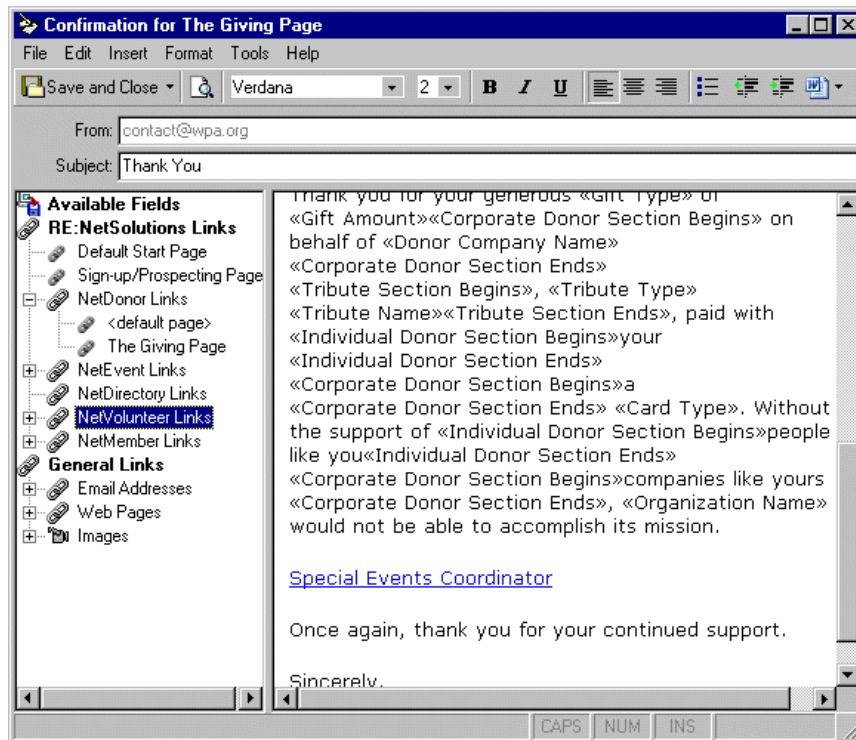
4. Double-click the page to which you want to create a link. The Insert Link to NetVolunteer Page screen displays.



5. In the **Description** field, enter what you want the link to say in your message. In the previous example, the donor will click on the words “Special Events Coordinator” to access your online job page.

**Note:** For information about working in **NetVolunteers**, see “NetVolunteers” on page 217.

6. In the **Job Page** field, the title of the selected job’s Web page defaults.
7. Click **OK**. The new link displays in your message.



8. After you add all the links and images you want to include in your message, click **Save and Close** to save your message and return to the wizard screen.

## NetMembers Link

You can include a link in your message to the online membership page(s) you created in **NetMembers**.

### ► Adding a link to your membership page

1. From **NetDonors**, **NetEvents**, **NetVolunteers**, or **NetMembers**, click the **Customize Layout** button. The Confirmation screen appears.

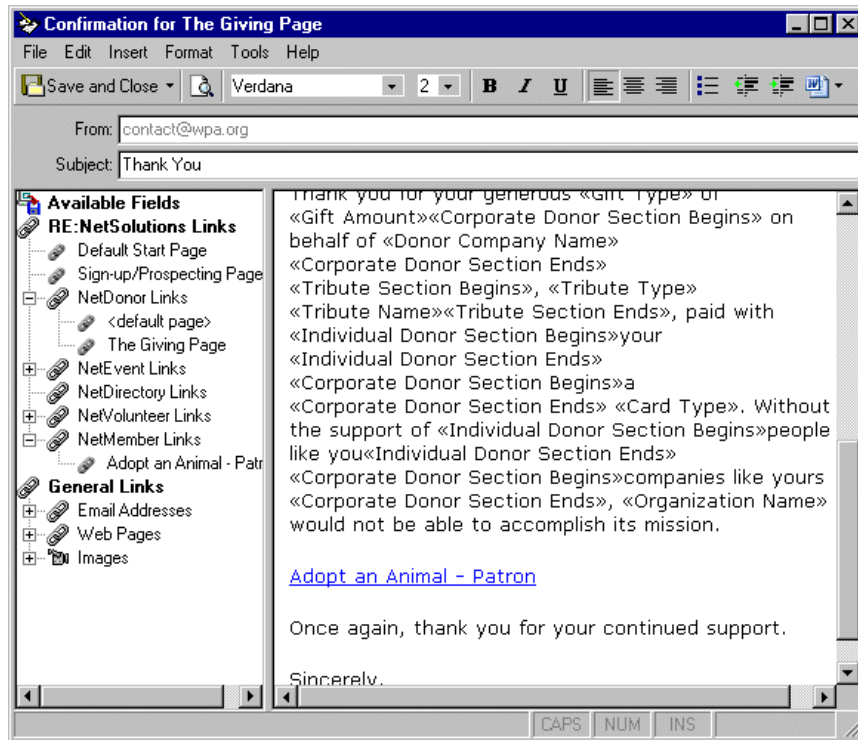
2. From the Confirmation screen, place your cursor in the right pane in the location you want to add a membership page link.
3. Double-click **NetMember Links** in the tree view. All available membership pages appear under **NetMember Links**.
4. Double-click the membership page to which you want to create a link. The Insert Link to NetMember Page screen displays.

5. In the **Description** field, enter what you want the link to say in your message. In the previous example, the donor will click on the words “Adopt an Animal - Patron” to access your online membership page.

**Note:** For information about working in **NetMembers**, see “NetMembers” on page 257.

6. In the **Membership Page** field, the title of the selected membership Web page defaults.
7. Enter the **Campaign, Fund, Appeal**, and/or **Package** you want credited for any donations.
8. For record keeping and reporting purposes, keep an up-to-date count of the number of constituents sent this message by marking the **Update number solicited for this appeal** checkbox. This information is helpful when trying to evaluate the success of the email effort. When you download your online transactions, the **No. solicited** field on the General tab of the appeal record is updated.
9. If the email is an appeal and your organization is in the habit of tracking appeals on constituent records, mark **Add this appeal to the constituent's record**. Enter the **Date** you want to appear with the appeal and any **Comment**.

10. Click **OK**. The new link displays in your message.



11. After you add all the links and images you want to include in your message, click **Save and Close** to save your message and return to the wizard screen.

## New Email Address

You can include in your message an email address link.

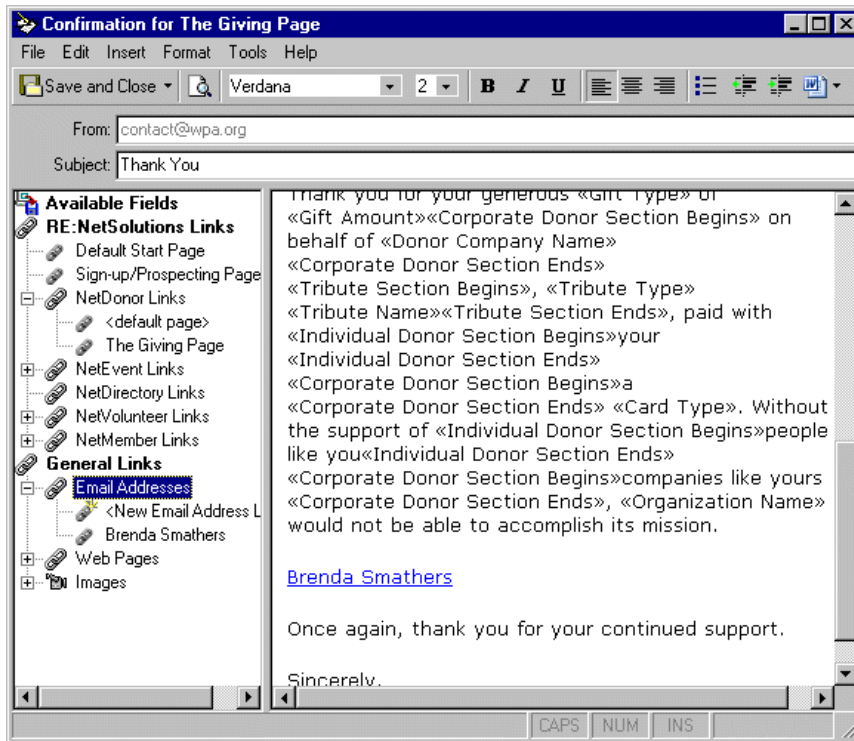
### ► Adding an email address link

1. From **NetDonors**, **NetEvents**, **NetVolunteers**, or **NetMembers**, click the **Customize Layout** button. The Confirmation screen appears.
2. From the Confirmation screen, place your cursor in the right pane in the location you want to add an email address link.
3. Double-click **Email Address** in the tree view. **New Email Addresses** displays under the **Email Address** category.
4. Double-click **New Email Addresses**. The Insert Email Address screen displays.



5. In the **Name** field, enter a name for the email address link you are including in the message. For example, in the previous example, the email recipient will click “Brenda Smathers” to bring up Brenda’s email address.

6. In the **Address** field, enter the individual's email address.
7. Click **OK**. A link to the email address displays in your email message.



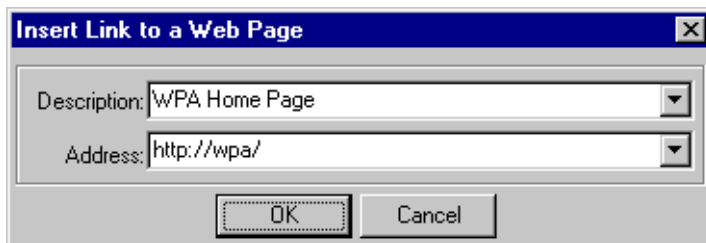
8. After you add all the links and images you want to include in your message, click **Save and Close** to save your message and return to the wizard screen.

## Web Page Link

You can include in your message a link to a non-*NetSolutions* Web page.

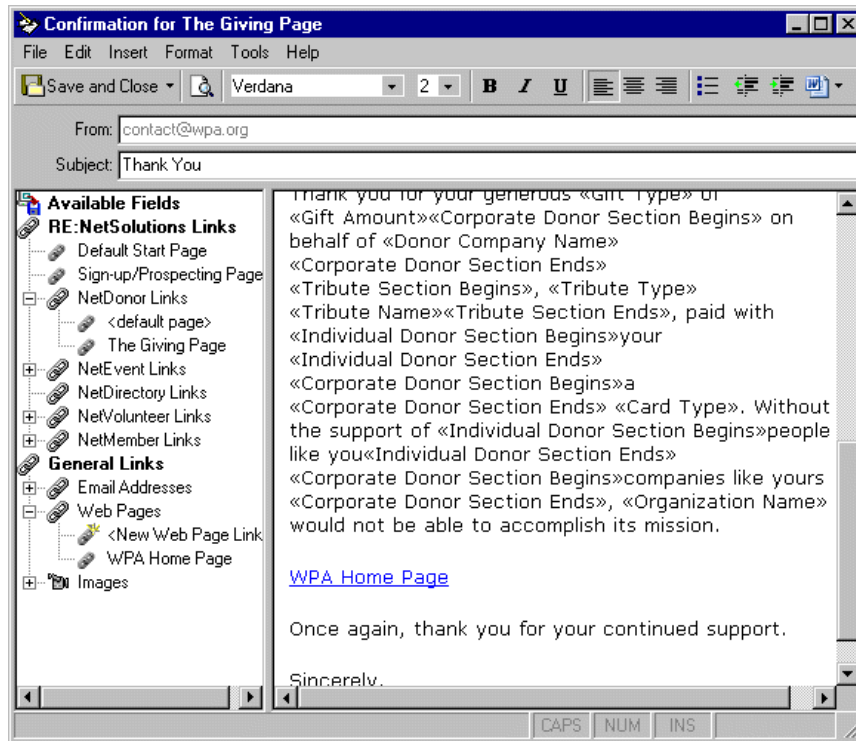
### ► Adding a link to a non-*NetSolutions* Web page

1. From **NetDonors**, **NetEvents**, **NetVolunteers**, or **NetMembers**, click the **Customize Layout** button. The Confirmation screen appears.
2. From the Confirmation screen, place your cursor in the right pane in the location you want to add a non-*NetSolutions* Web page link.
3. Double-click the **Web Pages** category. The **New Web Page Link** option displays.
4. Double-click **New Web Page Link**. The Insert Link to a Web Page screen displays.



5. In the **Description** field, enter what you want the link to say in your message. In the previous example, the donor will click on the words "WPA Home Page" to access the link address.

6. In the **Address** field, enter the address of the Web page.
7. Click **OK**. A link to the Web page now displays in your message.



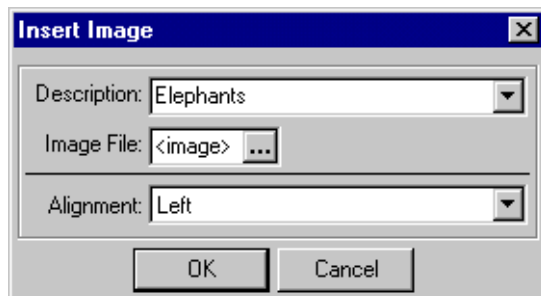
8. After you add all the links and images you want to include in your message, click **Save and Close** to save your message and return to the wizard screen.

## Images

You can include an image in your message. You can use any saved picture file or logo.

### ► Adding an image

1. From **NetDonors**, **NetEvents**, **NetVolunteers**, or **NetMembers**, click the **Customize Layout** button. The Confirmation screen appears.
2. From the Confirmation screen, place your cursor in the right pane in the location you want to add an image.
3. Double-click **Images**. The **New Image Link** displays.
4. Double-click **New Image Link**. The Insert Image screen displays.



5. In the **Description** field, enter a title for the image. This title displays under **Images** in the tree view. This image can be added to other messages by double-clicking on the description.
6. In the **Image File** field, click the ellipsis to access the Open screen.
7. Select the image file you want to include in your message and click **Open** to return to the Insert Image screen.
8. On the Insert Image screen, select an **Alignment**:
 

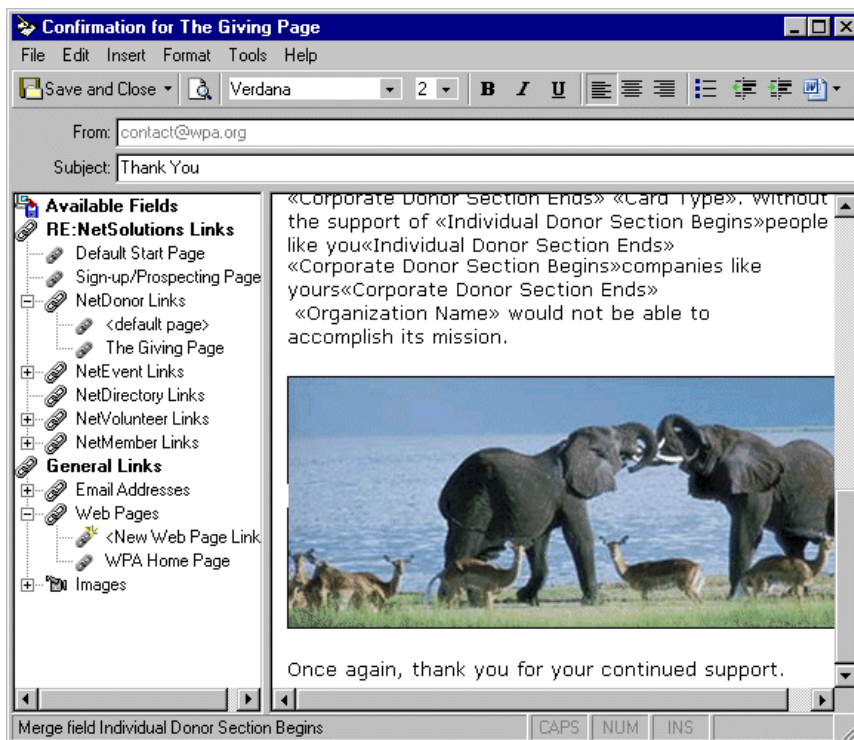
Left (Default) aligns the object to the left of the surrounding text. All preceding and subsequent text flows to the right of the object.

Right aligns the object to the right of the surrounding text. All subsequent text flows to the left of the object.

Top aligns the top of the object with the top of the text. The top of the text is the baseline plus the standard height of an ascender in the text.

Middle aligns the middle of the object with the surrounding text.

Bottom aligns the bottom of the object with the bottom of the surrounding text. The bottom is equal to the baseline minus the standard height of a descender in the text.
9. Click **OK**. The image displays in your message.



10. After you add all the links and images you want to include in your message, click **Save and Close** to save your message and return to the wizard screen.

# Changing Page Style



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Using the Page Style screen, you can give Web page(s) you create within the individual NetSolutions modules a unique look, setting them apart from your other *NetSolutions* pages. The style you established in **Configure and Customize** defaults to all of your *NetSolutions* Web pages, but you can change the style for each page using the Page Style screen.

The fields and checkboxes available on this screen change based on the **Page section** you select. You can change the background, logo and title, image, header, detail, body, table legend, table headers, table text, and error text styles. Every option you change on the Page Style screen is immediately reflected in the preview window.

A Page Style screen is present in the following NetSolutions modules:

**NetDonors**

**NetEvents**

**NetDirectories**

**NetVolunteers**

**NetMembers**

Although the procedure covered in this section uses the NetDirectories Page Style screen to illustrate the process, the procedure also applies to each module that allows you to edit Page Styles. Each option is explained in this section.

## Background Style

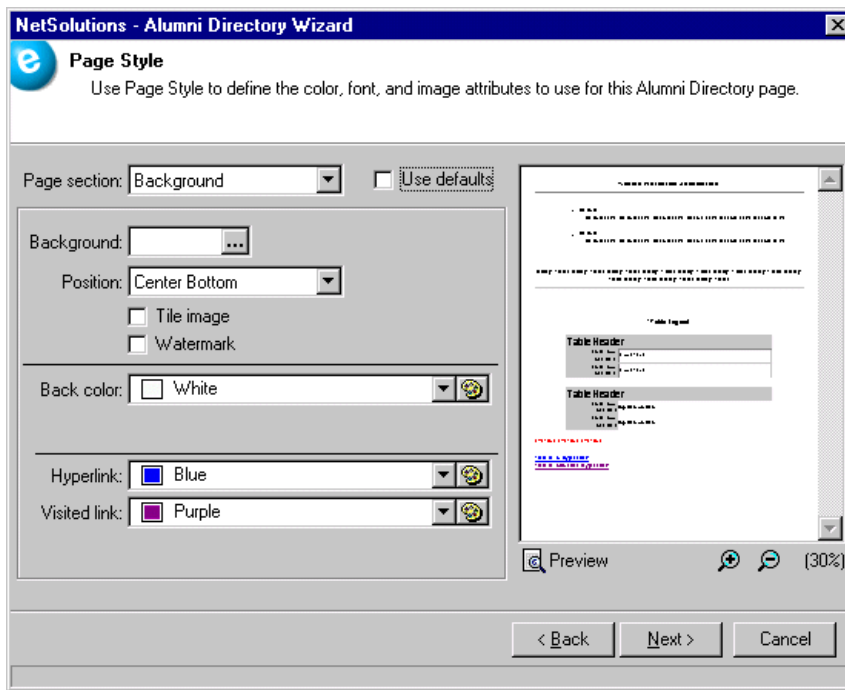
From the Page Style screen you can select background images and colors, hyperlink colors, and much more.

### ► Entering background styles for your Web page

**Note:** Although the examples included in this procedure are based on the Alumni Directory within NetDirectories, this procedure is applicable to any of the modules that feature a Page Style screen.

1. From the Page Style screen, in the **Page section** field, select “Background”.

- To use the page style you defined in **Configure and Customize**, mark **Use defaults**. To define a new style for your Web page, unmark **Use defaults**. All options and fields on the screen are activated.



- In the **Background** field, enter a background image to use. To map to the directory and folder in which the image is saved, click the ellipsis. The Open screen appears so you can map to the image location.
- In the **Position** field, select where on the Web page the image should be positioned. For example, if the image should be in the center of the page, select Center Center; if the image should be centered on the page, but at the bottom, select Center Bottom.
- Mark **Tile image** to have duplicates of the image to fill in the entire Web page.
- Mark **Watermark** and the text on the Web page scrolls to the image. The image is then always visible on the page.
- In the **Back color** field, select the background color to use on your Web page.
- In the **Hyperlink** field, select the color hyperlinks on the Web page will be displayed.
- In the **Visited link** field, select the color in which links visited by your users should appear.

**Note:** A preview screen on the right side of the Page Style screen shows you how the selections you made will appear on your Web page.

- Click **Preview** to visit a full-size sample page.
- Select another **Page section** to define. Or, if you completed this screen, click **Next** and move to the next wizard screen.

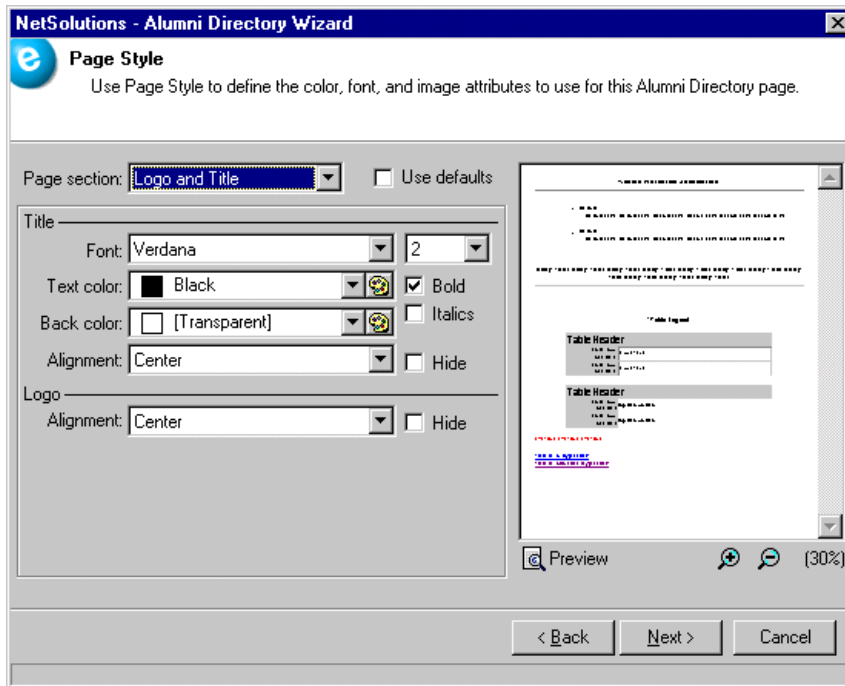
## Logo and Title

From the Page Style screen you can select your Web page's title font, text color, background color, logo, alignment, and more.

### ► Entering logo and title styles for your Web page

**Note:** Although the examples included in this procedure are based on the Alumni Directory within NetDirectories, this procedure is applicable to any of the modules that feature a Page Style screen.

1. From the Page Style screen, in the **Page section** field, select “Logo and Title”.
2. To use the page style you defined in **Configure and Customize**, mark **Use defaults**. To define a new style for your Web page, unmark **Use defaults**. All options and fields on the screen are activated.



3. In the **Title** frame, design the title for your Web page.
  - Select the **Font** to use in your title and enter the font size.
  - In the **Text color** field, select the color to use for the title text.
  - In the **Back color** field, select a background color to use behind your title.
  - In the **Alignment** field, select where on the Web page the title should be aligned: Left, Center, or Right.
  - Mark **Bold** to bold the title text; mark **Italics** to italicize the title text; mark **Hide** to hide the title.
4. In the **Logo** frame, you can select to include a logo in your title.
  - In the **Alignment** field, select where on the Web page the logo should be aligned: Left, Center, or Right; mark **Hide** to hide the logo.

**Note:** A preview screen on the right side of the Page Style screen shows you how the selections you made will appear on your Web page.

5. Click **Preview** to visit a full-size sample page.
6. Select another **Page section** to define. Or, if you completed this screen, click **Next** and move to the next wizard screen.

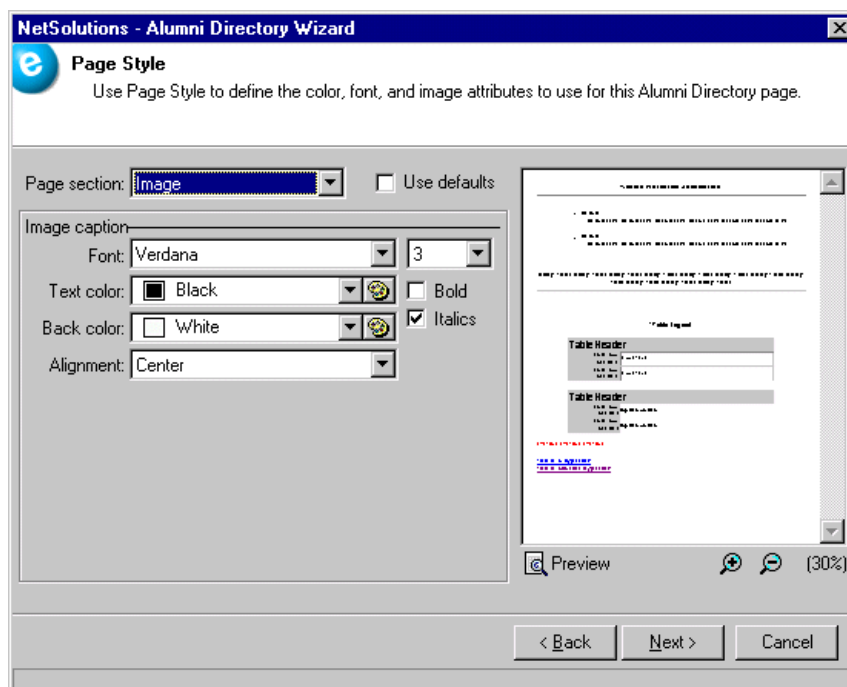
# Image Captions

From the Page Style screen you can customize the Web page image caption by selecting fonts, text color, background color, and more.

## ► Entering image caption styles for your Web page

**Note:** Although the examples included in this procedure are based on the Alumni Directory within NetDirectories, this procedure is applicable to any of the modules that feature a Page Style screen.

1. From the Page Style screen, in the **Page section** field, select “Image”.
2. To use the page style you defined in **Configure and Customize**, mark **Use defaults**. To define a new style for your Web page, unmark **Use defaults**. All options and fields on the screen are activated.



3. In the **Image caption** frame, design the caption used for your Web page image.
  - Select the **Font** to use in your caption and enter the font size.
  - In the **Text color** field, select the color to use for the caption.
  - In the **Back color** field, select a background color to use behind your caption.
  - In the **Alignment** field, select where on the Web page the caption should be aligned: Left, Center, or Right.
  - Mark **Bold** to bold the caption text; mark **Italics** to italicize the caption text.

**Note:** A preview screen on the right side of the Page Style screen shows you how the selections you made will appear on your Web page.

4. Click **Preview** to visit a full-size sample page.
5. Select another **Page section** to define. Or, if you completed this screen, click **Next** and move to the next wizard screen.

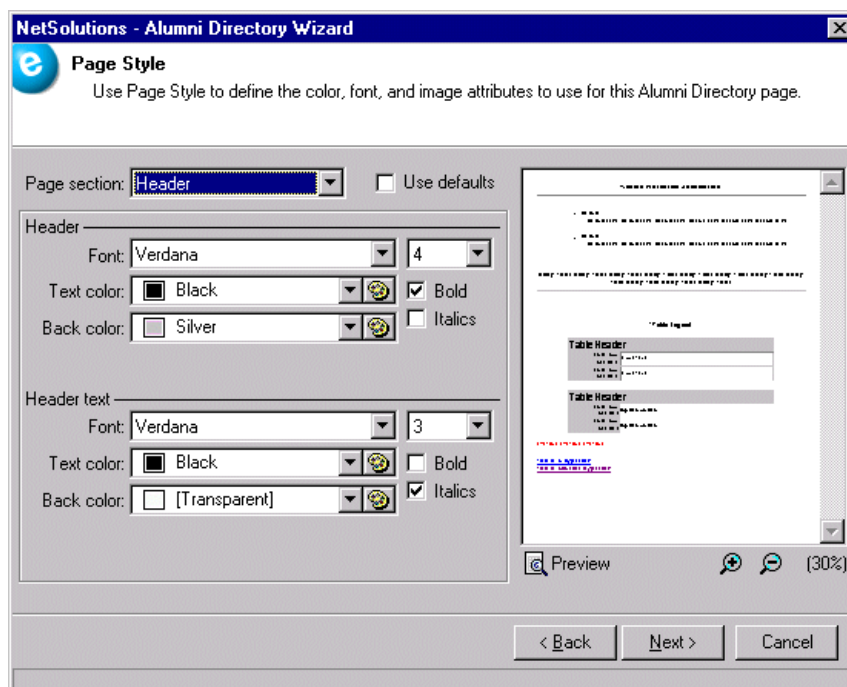
# Header

From the Page Style screen you can customize the header used on your Web page by selecting fonts, text color, background color, and more.

## ► Entering header styles for your Web page

**Note:** Although the examples included in this procedure are based on the Alumni Directory within NetDirectories, this procedure is applicable to any of the modules that feature a Page Style screen.

1. From the Page Style screen, in the **Page section** field, select “Header”.
2. To use the page style you defined in **Configure and Customize**, mark **Use defaults**. To define a new style for your Web page, unmark **Use defaults**. All options and fields on the screen are activated.



3. In the **Header** frame, design the header for your Web page.
  - Select the **Font** to use in your header and enter the font size.
  - In the **Text color** field, select the color to use for the header.
  - In the **Back color** field, select a background color to use behind your header.
  - Mark **Bold** to bold the header; mark **Italics** to italicize the header.
4. In the **Header text** frame, design the text to appear under your header on your Web page.
  - Select the **Font** to use in your header text and enter the font size.
  - In the **Text color** field, select the color to use for the header text.
  - In the **Back color** field, select a background color to use behind your header text.
  - Mark **Bold** to bold the header text; mark **Italics** to italicize the header text.

**Note:** A preview screen on the right side of the Page Style screen shows you how the selections you made will appear on your Web page.

5. Click **Preview** to visit a full-size sample page.
6. Select another **Page section** to define. Or, if you completed this screen, click **Next** and move to the next wizard screen.

## Detail

From the Page Style screen, you can determine how the detail information, explaining your organization appears on your Web page. You can select fonts, text color, background color, and more.

### ► Entering detail styles for your Web page

**Note:** Although the examples included in this procedure are based on the Alumni Directory within NetDirectories, this procedure is applicable to any of the modules that feature a Page Style screen.

1. From the Page Style screen, in the **Page section** field, select “Detail”.
2. To use the page style you defined in **Configure and Customize**, mark **Use defaults**. To define a new style for your Web page, unmark **Use defaults**. All options and fields on the screen are activated.

NetSolutions - Alumni Directory Wizard

**Page Style**  
Use Page Style to define the color, font, and image attributes to use for this Alumni Directory page.

Page section: **Detail** ☐ Use defaults

**Detail**

Font: Verdana 2

Text color: Black ☐ Bold

Back color: [Transparent] ☐ Italics

**Detail text**

Font: Verdana 2

Text color: Black ☐ Bold

Back color: [Transparent] ☐ Italics

Preview (30%)

< Back Next > Cancel

3. In the **Detail** frame, design the detail header for your Web page.
  - Select the **Font** to use in your detail header and enter the font size.
  - In the **Text color** field, select the color to use for the detail header.
  - In the **Back color** field, select a background color to use behind your detail header.
  - Mark **Bold** to bold the detail header; mark **Italics** to italicize the detail header.
4. In the **Detail text** frame, design the text to appear under your detail header on your Web page.
  - Select the **Font** to use in your detail text and enter the font size.
  - In the **Text color** field, select the color to use for the detail text.
  - In the **Back color** field, select a background color to use behind your detail text.
  - Mark **Bold** to bold the detail text; mark **Italics** to italicize the detail text.

**Note:** A preview screen on the right side of the Page Style screen shows you how the selections you made will appear on your Web page.

5. Click **Preview** to visit a full-size sample page.
6. Select another **Page section** to define. Or, if you completed this screen, click **Next** and move to the next wizard screen.

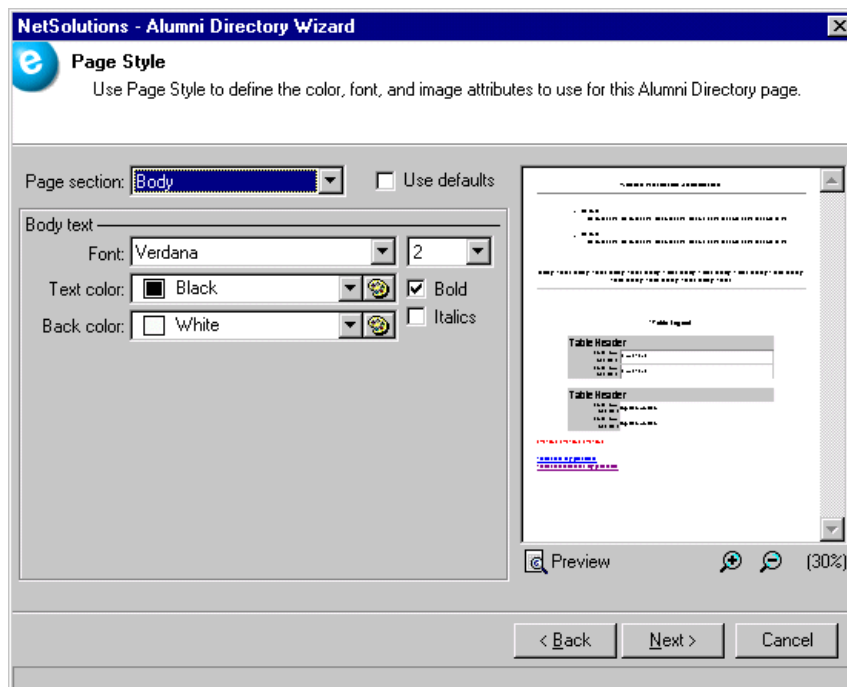
## Body Text

From the Page Style screen, you can format the body text used on your Web page. You can select fonts, text color, background color, and more.

### ► Entering body text styles for your Web page

**Note:** Although the examples included in this procedure are based on the Alumni Directory within NetDirectories, this procedure is applicable to any of the modules that feature a Page Style screen.

1. From the Page Style screen, in the **Page section** field, select “Body”.
2. To use the page style you defined in **Configure and Customize**, mark **Use defaults**. To define a new style for your Web page, unmark **Use defaults**. All options and fields on the screen are activated.



3. In the **Body text** frame, design the body text for your Web page.
  - Select the **Font** to use in your body text and enter the font size.
  - In the **Text color** field, select the color to use for the body text.
  - In the **Back color** field, select a background color to use behind your body text.
  - Mark **Bold** to bold the body text; mark **Italics** to italicize the body text.

**Note:** A preview screen on the right side of the Page Style screen shows you how the selections you made will appear on your Web page.

4. Click **Preview** to visit a full-size sample page.
5. Select another **Page section** to define. Or, if you completed this screen, click **Next** and move to the next wizard screen.

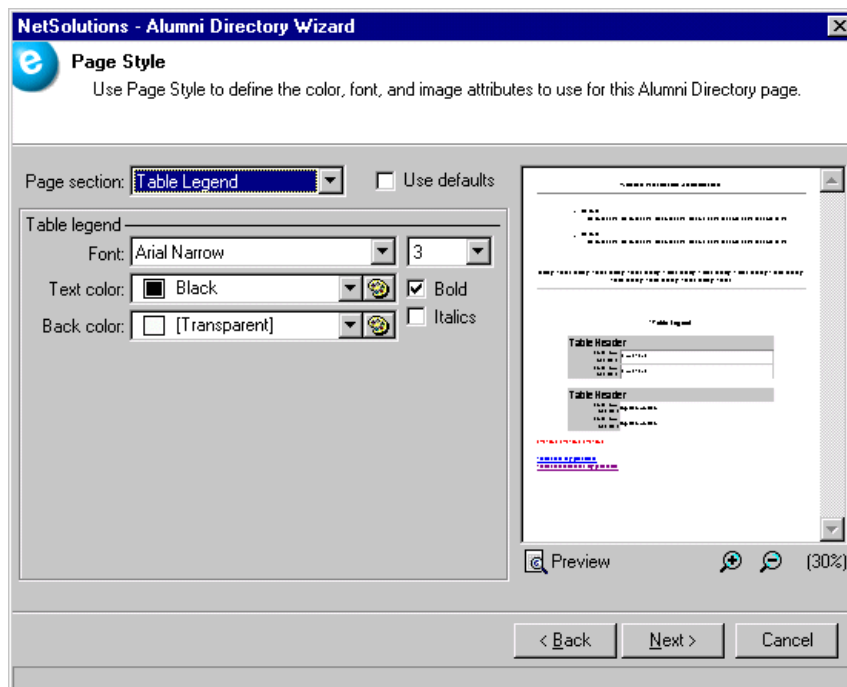
## Table Legends

From the Page Style screen, you can format table legends you include on your Web page. You can select fonts, text color, background color, and more.

### ► Entering table legend styles for your Web page

**Note:** Although the examples included in this procedure are based on the Alumni Directory within NetDirectories, this procedure is applicable to any of the modules that feature a Page Style screen.

1. From the Page Style screen, in the **Page section** field, select “Table Legend”.
2. To use the page style you defined in **Configure and Customize**, mark **Use defaults**. To define a new style for your Web page, unmark **Use defaults**. All options and fields on the screen are activated.



3. In the **Table legend** frame, define the table legends for your Web page.
  - Select the **Font** to use in your table legend and enter the font size.
  - In the **Text color** field, select the color to use for the table legend.
  - In the **Back color** field, select a background color to use behind your table legend.
  - Mark **Bold** to bold the table legend text; mark **Italics** to italicize the table legend text.

**Note:** A preview screen on the right side of the Page Style screen shows you how the selections you made will appear on your Web page.

4. Click **Preview** to visit a full-size sample page.



5. Select another **Page section** to define. Or, if you completed this screen, click **Next** and move to the next wizard screen.

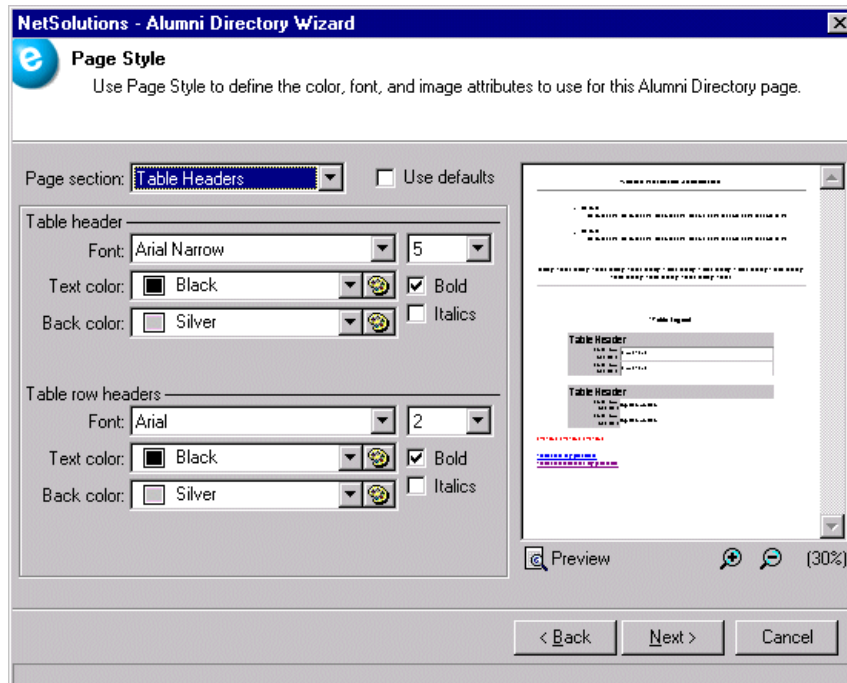
## Table Headers

From the Page Style screen you can format table headers you include on your Web page. You can select fonts, text color, background color, and more.

### ► Entering table header styles for your Web page

**Note:** Although the examples included in this procedure are based on the Alumni Directory within NetDirectories, this procedure is applicable to any of the modules that feature a Page Style screen.

1. From the Page Style screen, in the **Page section** field, select “Table Header”.
2. To use the page style you defined in **Configure and Customize**, mark **Use defaults**. To define a new style for your Web page, unmark **Use defaults**. All options and fields on the screen are activated.



3. In the **Table header** frame, design the table headers for your Web page.
  - Select the **Font** to use in your table header and enter the font size.
  - In the **Text color** field, select the color to use for the table header.
  - In the **Back color** field, select a background color to use behind your table header.
  - Mark **Bold** to bold the table header; mark **Italics** to italicize the table header.
4. In the **Table row headers** frame, design your table row header text.
  - Select the **Font** to use in your table row header text and enter the font size.
  - In the **Text color** field, select the color to use for the table row header text.
  - In the **Back color** field, select a background color to use behind your table row header text.
  - Mark **Bold** to bold the table row header text; mark **Italics** to italicize the table row header text.

**Note:** A preview screen on the right side of the Page Style screen shows you how the selections you made will appear on your Web page.

5. Click **Preview** to visit a full-size sample page.
6. Select another **Page section** to define. Or, if you completed this screen, click **Next** and move to the next wizard screen.

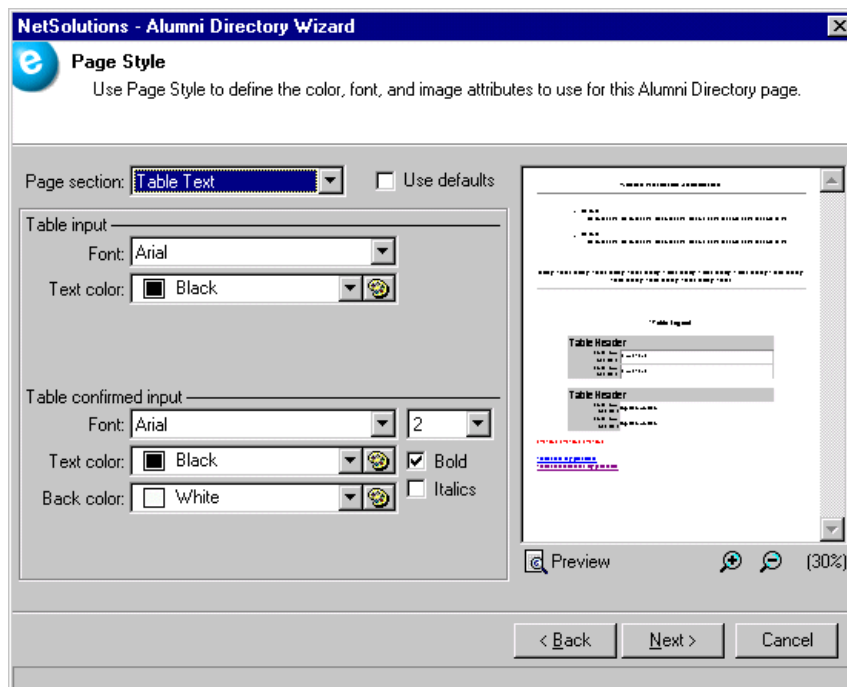
## Table Text

From the Page Style screen, you can format text entered into tables included on your Web page. You can select fonts, text color, background color, and more.

### ► Entering table text styles for your Web page

**Note:** Although the examples included in this procedure are based on the Alumni Directory within NetDirectories, this procedure is applicable to any of the modules that feature a Page Style screen.

1. From the Page Style screen, in the **Page section** field, select “Table Text”.
2. To use the page style you defined in **Configure and Customize**, mark **Use defaults**. To define a new style for your Web page, unmark **Use defaults**. All options and fields on the screen are activated.



3. In the **Table input** frame, select how text entered into tables included on your Web page should appear.
  - Select the **Font** to use for your table input text and enter the font size.
  - In the **Text color** field, select the color to use for the table input text.
4. In the **Table confirmed input** frame, select how confirmed text entered into tables included on your Web page should appear.
  - Select the **Font** to use for your table confirmed input text and enter the font size.
  - In the **Text color** field, select the color to use for the table confirmed input text.

- In the **Back color** field, select a background color to use behind your table confirmed input text.
- Mark **Bold** to bold the table confirmed input text; mark **Italics** to italicize the table confirmed input text.

**Note:** A preview screen on the right side of the Page Style screen shows you how the selections you made will appear on your Web page.

5. Click **Preview** to visit a full-size sample page.
6. Select another **Page section** to define. Or, if you completed this screen, click **Next** and move to the next wizard screen.

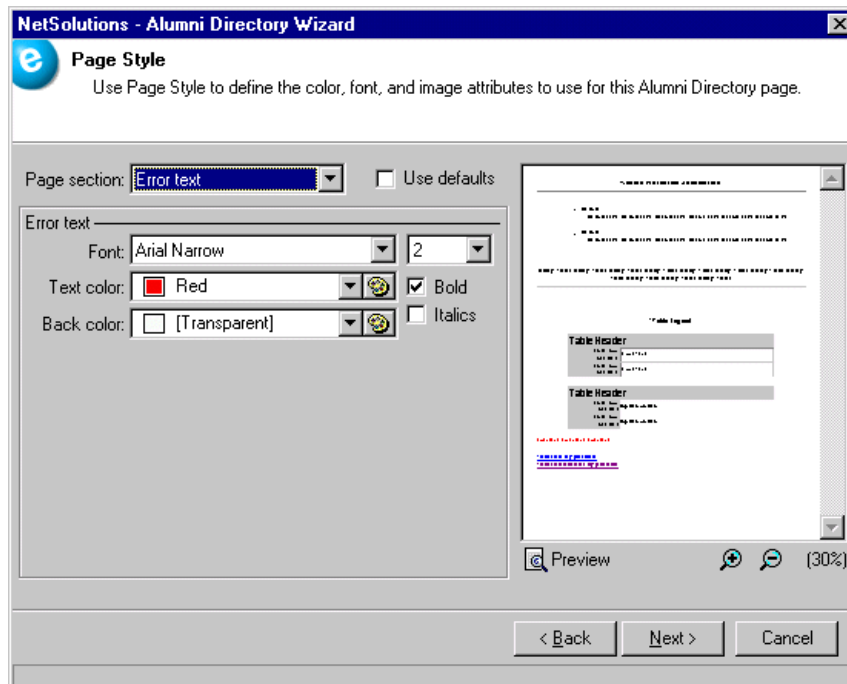
## Error Text

From the Page Style screen, you can format error messages users may receive while working on your Web page. You can select fonts, text color, background color, and more.

### ► Entering error message styles for your Web page

**Note:** Although the examples included in this procedure are based on the Alumni Directory within NetDirectories, this procedure is applicable to any of the modules that feature a Page Style screen.

1. From the Page Style screen, in the **Page section** field, select “Error Text”.
2. To use the page style you defined in **Configure and Customize**, mark **Use defaults**. To define a new style for your Web page, unmark **Use defaults**. All options and fields on the screen are activated.



3. In the **Error text** frame, define the error text to use for your Web page.
  - Select the **Font** to use in your error text and enter the font size.
  - In the **Text color** field, select the color to use for the error text.
  - In the **Back color** field, select a background color to use behind your error text.

- Mark **Bold** to bold the error text; mark **Italics** to italicize the error text.

**Note:** A preview screen on the right side of the Page Style screen shows you how the selections you made will appear on your Web page.

4. Click **Preview** to visit a full-size sample page.
5. Select another **Page section** to define. Or, if you completed this screen, click **Next** and move to the next wizard screen.



# Glossary



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

**Adobe® Acrobat® Reader.** *Adobe® Acrobat® Reader* is a third-party software application that enables electronic distribution of formatted documents. *Adobe® Acrobat® Reader* can be downloaded free from the Adobe Web site.

**ASP.** ASP stands for Application Service Provider. An application service provider is a company offering individuals or enterprises access over the Internet to application programs and related services that would otherwise have to be located in their own personal or enterprise computers.

**Assignment interest.** An assignment interest is a task a volunteer expresses a desire to perform. For example, your organization is an aquarium. Rosa Shapiro lets you know she would like to help feed the seals or penguins. Because Rosa lets you know the tasks she is interested in, you can assign her to the jobs she enjoys. You can track volunteer assignment interests on the Volunteer tab of a constituent record.

**Attribute.** An attribute is a reporting tool you use to group information based on a common theme. With attributes defined, you can filter information to your specifications. Examples of ***The Raiser's Edge*** attributes include account attributes, project attributes, transaction attributes, action attributes, vendor attributes, purchase order attributes, and invoice/credit memo attributes.

**Batch.** A batch is a group of debit and credit transactions you can post to your ledger accounts. By placing transactions into a batch, you can group transactions according to source, date, time, and function.

**Batch validation.** Batch validation is a process used to make sure your batches are in balance before posting. The program looks at each transaction to ensure that all required fields are entered and each entry meets certain requirements.

**Bitmap.** A bitmap is a scanned image. These images are saved with the \*.bmp file name. For example, electronic signatures are saved as bitmaps.

**Business rule.** A business rule is a system-wide preference you set in *Configuration* to customize standard procedures and requirements. With business rules, you can control functions and displays affecting all users in the program.

**Configuration.** *Configuration* is a shared area of ***The Raiser's Edge*** you use to set up your system and define settings to customize the program for individual users.

**Constituent code.** A constituent code defines the relationship a constituent has with your organization. In other words, a constituent code tells you why the individual is in your database. Examples of constituent codes are Board Member, Alumnus, Trustee, Current Parent, and Friend.

**Contact.** A contact is the name of the primary person with whom you conduct business. For example, you can enter contact information about a vendor on the Vendor tab of a vendor record, or you can enter contact information on the Banks tab of an open bank record.

**Cookie.** A cookie is information a Web site puts on your hard disk so it can remember something about you at a later time. It is a mechanism that allows the server to store its own information about a user on the user's own computer.

**Database.** A database is a collection of information organized so that a computer program can quickly select desired pieces of data. It works much like an electronic filing system. Traditional databases are organized by fields, records, and files. A field is a single piece of information; a record is a set of fields; and a file is a collection of records.

**Default.** A default is a field entry you select on the Options screen to help increase the ease and speed of data entry by providing a preset value.

**Default Set.** A default set is a record of default transaction information you can create and load in a batch. Once loaded, the defaults appear on the record.

**Dynamic query.** A dynamic query is a query that refreshes and updates results automatically each time the query is run, providing the most current results.

**Encryption.** Encryption is the conversion of data into a form called ciphertext. Ciphertext cannot be easily understood by unauthorized people.

**Field.** A field is a data entry box in which you add and store information on records in your database.

**Find Jobs button.** **Find Jobs** is a button on the action bar on the Volunteer tab of a constituent record. You can use the **Find Jobs** button to automatically find multiple jobs and assign them to a volunteer. When you use the **Find Jobs** button, you can assign only those jobs having criteria that matches exactly criteria listed on the Volunteer tab.

**Find Volunteers menu option.** **Tools, Find Volunteers** is found on the menu bar of a job record. You can use **Tools, Find Volunteers** to automatically find multiple volunteers and assign them to a job. When you use **Tools, Find Volunteers**, you can assign only those volunteers having criteria that matches exactly criteria listed on the job record.

**Firewall.** A firewall is a set of related programs, located at a network gateway server, that protects the network resources from user on another network. A firewall works closely with the router program, examines each network packet, and determines if it is safe to forward the packet on to its destination in the network.

**Gift of membership.** A gift of membership describes a situation in which a constituent is the primary beneficiary of membership benefits, but is not responsible for the membership dues. For example, a parent can give a gift of membership to a child. The parent pays the membership dues, and the child benefits from the membership. The donor, or person paying the membership dues, and the member receiving the benefits must have a constituent record in your database.

**Home page.** The Home page is a feature common to all *The Raiser's Edge* programs that provides a central location for quick and easy access to all areas of the program. Using links and tabs, you can customize your Home page to display records and functions you use most frequently.

**Hypertext link.** A hypertext link is text or a graphic in a help file or Web page that, when selected, takes you to another location. Hypertext links are typically blue and underlined.

**HTTP.** HTTP stands for Hyper Text Transfer Protocol. This protocol is most often used to transfer information from World Wide Web servers to browsers, which is why Web addresses begin with http://. This is also called Hypertext Transport Protocol.

**HTTPS.** HTTPS stands for Hyper Text Transmission Protocol Secure. This protocol is a Web protocol built into the browser that encrypts and decrypts user page requests as well as the pages that are returned by the Web server. For example, you visit a Web site and view a catalog. When you are ready to order, you are given a Web page order form with a URL that starts with https://. When you click **Send**, to send the page back to the catalog retailer, your browser's HTTPS layer encrypts the page. The acknowledgement you receive from the server also travels encrypted, arriving with an https:// URL. The page is decrypted for you by your browser's HTTPS sublayer.

**Job.** A job is a task, or miscellaneous piece of work, assigned to a volunteer of your organization. For example, your organization is a hospital and you run a gift shop. You have volunteers who come in to run the cash register and volunteers who come in to stock shelves. You have several volunteers who come in to create gift baskets and another volunteer who helps with computer data entry. Each of these tasks, performed by a volunteer, is a volunteer job.

**Job assignment.** A job assignment is a record you create when you assign a volunteer to a job. You can manually find a job and assign it to a volunteer by using the **New Job Assignment** button on the Volunteer tab of his constituent record or you can automatically find jobs and assign them to a volunteer by using the **Find Jobs** button on the same tab. For added convenience, you can also automatically find volunteers and assign them to a job by using **Tools, Find Volunteers** from the menu bar of the job record itself.

**Lifetime membership.** You can establish and track lifetime memberships for your constituents. Once you set up a lifetime membership, you can always track membership information, even after the constituent is deceased. Lifetime memberships do not expire, nor do they receive membership renewals.

**Media.** Media is any stored information related to a record, such as an article, media clip, or image file.

**Membership benefit.** A membership benefit is a bonus your organization gives to constituents depending on their level of membership or the dues they pay. For example, you may give discounts in your gift shop and free passes to your museum with each family membership. You can determine the membership benefits associated with each membership category in advance or you can enter this information from the membership record.

**Membership category.** A membership category defines the level of giving required for a constituent to gain membership into one of your membership groups or clubs. Membership categories can be linked to a specific membership program. For example, a zoo may have the categories of Junior Curator and Young Explorer under the Kid's Club membership program. While dues for a Young Explorer are \$15, a member of the Junior Curator category, the next level of membership in the Kid's Club program, pays \$25 in dues.

**Membership program.** A membership program is the overall umbrella description for a group of membership categories. For example, a museum may have an Arts Program with membership categories of Individual, Student, Family, Sustainer, and Patron.

**Membership record.** The membership record is the record in which constituent membership information is stored and maintained. The membership record is composed of three tabs: the Membership tab, the Membership History tab, and the Attributes/Notes tab.

**Membership standing.** A membership standing is used to describe the status of a specific membership. The membership standing appears in the top right-hand corner of a membership record and changes when the membership expires or a membership transaction is entered and saved. The membership standings are New, Active, Lapsed, and Dropped. In User Options, you can also change the color or style of print for the membership standing as it appears on the membership record for easy reference.

**Membership subcategory.** A membership subcategory defines, more specifically, the member's area of interest. For example, a zoo with a Junior Curator category in the Kid's Club program may also have the subcategories of Lion, Panda, Koala, Polar Bear, and Sea Turtle, to which each member who is most interested in that animal belongs.



**Membership transaction.** A membership transaction is used to describe the separate membership activities comprising a membership record. The activities can include adding, renewing, rejoining, upgrading, downgrading, and dropping a membership. For example, in February 2002, you add an individual membership for Mr. David Murphy. In January 2003, David decides to renew his membership. In this case, you made two separate transactions for David's membership record.

**Option.** An option is a preference you select that specifies defaults in *The Raiser's Edge*. Options are password-specific and follow the user, regardless of the workstation he logs into.

**Password.** A password is a series of typed characters required to access a computer program. This prevents unauthorized users from entering the program.

**PDF (Portable Document Format).** A PDF is a type of document viewed with *Adobe® Acrobat® Reader* that maintains its formatting and displays correctly on any output device. For example, *The Raiser's Edge* user guides are saved as PDFs and can be printed or accessed from the Help file, Online Manual page of the program, or the installation CD. PDF files contain hyperlinks so you can jump from topic to topic.

**Preferences.** See "Option" on page 404.

**Qualification.** A qualification is a skill, experience, course, or training a volunteer must have to qualify, or be accepted, as a volunteer for the jobs at your organization. For example, your humanitarian organization is looking for people with certain talents to help build homes for families in need. You are looking for volunteers with carpentry, plumbing, roofing, and painting skills. Your organization runs a health clinic and you are looking for volunteers with medical experience. Your organization requires that volunteers take a Health and Sanitation class before they start work in your soup kitchen or attend a Volunteer Orientation training session before they start any job. All these things are qualifications.

**Query.** Query is the means by which you flag, group, and list selected records from your database. You can create dynamic and static queries specific to key areas of *The Raiser's Edge* based on a set of criteria you define. Although queries group entire records, you can limit and sort the output information included in query results. You can use saved queries to limit the information processed in *Records*, *Mail*, and other areas of *The Raiser's Edge*. Using queries in this manner reduces data processing time.

**Query format.** Queries can be created in one of two formats: Dynamic and Static. Static queries search the database and generate a list of records that match the specified criteria at a specific point in time. Dynamic queries search the database and return records that match the criteria using the current database of information.

**Query type.** Query types correspond to specific application records. These vary according to the program you are using. Your selection identifies the record type you want to query and makes a list of that record's fields available for filtering, output, and sorting.

**Record.** A record is a page in *The Raiser's Edge* from which you add, edit, and delete information such as names, addresses, relationships, gifts, memberships, events. *Records* is also an area in *The Raiser's Edge* where you can manage records.

**Renewal Notice.** If you have Membership Management, you can print renewal notices for memberships that have lapsed or will lapse. Sending renewal notices can increase your membership retention rate. For example, last year John Smith donated \$50 to become a member of Friends of the Orchestra. His membership is scheduled to expire in three months. You can send him a renewal notice to encourage and remind him to extend his membership an additional year. If you do not send a renewal notice, John may forget to extend his membership or decide it is not worth the trouble to contact you again.

**Security.** *Security* is a shared area in *The Raiser's Edge* in which you establish access rights for users. With *Security* you can control what specific groups of users are allowed to view, add, edit, or delete information.

**Security group.** A Security group is a group of users you define in *Administration*. You control security in *The Raiser's Edge* by creating groups with specific rights and assigning users to groups based on how much system access you want them to have. You can edit the rights of existing groups.

**Server.** A server is a powerful computer or processor dedicated to managing disk drives, printers, or network traffic. Servers are often dedicated, meaning they perform no tasks other than server tasks. For example, a dedicated database server for processing database queries has no other functions besides processing the queries.

**Shared component.** A shared component is a feature shared by all *The Raiser's Edge* programs and modules.

**Shared table.** A shared tables is a table common throughout *The Raiser's Edge*.

**Shell.** The shell is a central area from which you can access all areas of *The Raiser's Edge*. When you click a link to access an area, it appears as a page in the shell.

**Shortcut menu.** A shortcut menu is a list of commonly used commands you can select to quickly perform actions or to display properties. **Open**, **Delete**, **Print**, and **Properties** are common shortcut menu items. To access shortcut menus, place your cursor in a field or grid and click the right mouse button.

**Special need.** A special need indicates a volunteer's special consideration or request that can prevent her from being assigned to a job. For example, Rebecca Schmidt, a volunteer at your organization, lets you know she needs you to provide a baby-sitting service before she can volunteer at your upcoming phonathon. You are not providing a baby-sitting service at this event. On the Details tab of the phonathon job record, you enter Baby-Sitting Service so you can eliminate any volunteer having this special need. On the Volunteer tab of Rebecca's constituent record, you enter Baby-Sitting Service as a special need. When you assign volunteers to the phonathon jobs, Rebecca will potentially be eliminated because the special needs match. Special needs are beneficial for you and your volunteers because they help you schedule volunteers' work appropriately.

**SSL.** SSL stands for Secure Sockets Layer. It is designed to provide secure communications on the Internet.

**Static query.** A static query is a query that provides a record of query output that existed at the time you established the query. If you run a report two months later using the same query, the system restricts the new output to only the records from the original query. Data entered after the original query is disregarded.

**Status bar.** The status bar is a horizontal strip at the bottom of a screen that displays important messages to assist you in the program. For example, when the cursor is in a field with a table lookup available, "Press F7 for Table Lookup" appears in the status bar.

**Tab.** A tab is a design element that appears at the top of some screens in *The Raiser's Edge*. Tabs work to separate options into themed groups. For instance, you will find formatting options on various system Format tabs.

**Table.** A table is a field in which you can pre-define entries to save time and promote consistency for your data entry.

**Table lookup.** A table lookup is a table from which you can select and enter information into fields to speed data entry. To access a table lookup, place your cursor in a lookup field and press **F7**.

**Title bar.** A title bar is a horizontal strip at the top of a screen that identifies a program or file.

**Toolbar.** A toolbar is a horizontal strip with buttons that, when clicked, perform specific tasks. It is located under the title bar at the top of a screen. Common toolbar buttons include **New**, **Open**, **Save**, and **Print**.

**Transaction Log.** Also called a "Change File," this file records transactional changes occurring in the database, providing a basis for updating a master file and establishing an audit trail.

**Tree View.** A tree view is a hierarchical list used throughout *The Raiser's Edge*. Tree Views differ from standard lists in that items in a tree view contain branches represented by dotted lines. Some tree views automatically display all branches; for others you must click a plus sign to view the branches.

**URL.** URL stands for Uniform Resource Locator (formerly Universal Resource Locator). This is an Internet address which tells a browser where to find an Internet resource. For example, the URL for Blackbaud is <http://www.blackbaud.com/>.

**User option.** See "Option" on page 404.

**Volunteer.** A volunteer is a person who voluntarily undertakes a task, or a specialized piece of work, for an organization and expects no pay in return. For example, your organization holds a Spring Gala every year. Several members of the community help you plan the gala. Others help you decorate, send out invitations, and hire entertainment. You hold a golf tournament and two individuals offer to take event photos for your newsletter. A group of people come to your organization on a weekly basis to help with office work and computer data entry. You are sending out a membership mailing and a group of people volunteer to fold letters and stuff envelopes. The individuals who give their time to your organization and request no pay in return are volunteers.

**Volunteer availability.** The dates, days, and times each volunteer is available to work is the volunteer availability. For example, James Rooney, a volunteer at your animal shelter, lets you know he is available to work every Friday this year, from 8:00 a.m. until noon. You can track volunteer availability on the Volunteer tab of a constituent record.

**Volunteer status.** Volunteer status denotes whether a volunteer is active or not. A volunteer can have multiple statuses. For example, Shannon Thompson, a volunteer at your organization, is assigned two volunteer types: Gift Shop Staff and Business Office Staff. Shannon is currently working in the gift shop and has discontinued working in your business office. She worked in your business office regularly last year. In the **Volunteer Types** grid, you can assign the status of Active in the **Status** column on the same row as the Gift Shop Staff type and a status of Inactive on the same row as the Business Office Staff type.

**Volunteer type.** Volunteer type denotes the capacity in which a volunteer can serve your organization. For example, Ashley Ziegler, a volunteer with your organization, works in your gift shop. You assign a **Type** of “Gift Shop Staff” in the **Volunteer Types** grid on the Volunteer tab of her constituent record. A volunteer can be multiple types. For example if Ashley also starts volunteering in your business office, you can add another **Type** of “Business Office Staff” in the **Volunteer Types** grid.

**XML.** XML stands for eXtensible Markup Language. This language is used to structure and describe data that a broad range of applications can understand. XML is a meta language; it describes other languages. For example, it works much like grammar, which describes language with verbs, subjects, adjectives, etc. A data-centric language, XML describes the kind of information in a document, unlike standard languages, such as HTML that tell only how the document should look.

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