The Raiser's Edge™

Program Basics Guide

Contents

What Is In This Guide?

In the *Program Basics Guide*, you learn to how to navigate in *The Raiser's Edge*, how to use basic functions, and how to set up individual user options. You can learn about the following.

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How Do I Use These Guides?

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

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

User Guides. You can access PDF versions of the guides by selecting **Help**, **User Guides** from the shell menu bar or by clicking **Help** on the Raiser's Edge bar in the program. You can also access the guides on our Web site at www.blackbaud.com. From the menu bar, select **Support**, **User Guides**.

In a PDF, page numbers in the Table of Contents, Index, and all cross-references are hyperlinks. For example, click the page number by any heading or procedure on a Table of Contents page to go directly to that page.

Help File. In addition to user guides, you can learn about *The Raiser's Edge* by accessing the help file in the program. Select **Help**, **The Raiser's Edge Help Topics** from the shell menu bar or press **F1** on your keyboard from anywhere in the program.

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

Introduction

Welcome to *The Raiser's Edge*, the most popular fundraising software in the world. *The Raiser's Edge* is an invaluable tool for enhancing your fundraising efforts and maximizing the organization and efficiency of your developmental staff.

Using *The Raiser's Edge*, you can monitor every aspect of your fundraising. *The Raiser's Edge* provides you with an array of tools to track information for your donors (called constituents in *The Raiser's Edge*). You can maintain a detailed biographical record for all your constituents, including employment, banking, and relationship information. Using special "notepads" and unique categories of information called attributes, you can customize your records to contain information specific to your organization. You can use this information to increase the effectiveness of your appeals by accurately matching them to your constituents.

When you establish and enter your campaigns, funds, and appeals, you can include information such as start and end dates, categories, and overall goals. Members of your organization who solicit donations can be arranged into hierarchies by team or individual for your campaigns and funds. You can then run a wide assortment of reports to analyze the progress, performance, and success of your fund-raising efforts.

Gifts and constituents can be entered in batches to save time. You can keep detailed records of all your gifts, including information on matching gift corporations, soft credits, and split gifts. *The Raiser's Edge* offers a variety of tools and reports to help you monitor all actions and mailings associated with gift entry.

You can further customize *The Raiser's Edge* to fit the needs of your organization by using optional modules. For example, an educational organization can use the optional module *Alumni Tracking* to provide additional information and reporting capabilities for alumni constituents. Optional modules are available to fit the specific needs of all types of fund-raising organizations

> **Note**: For information about purchasing optional modules or *The Financial Edge*, contact our Sales department at 1-800-443-9441.

If you have *The Financial Edge*, you can link the databases of the two programs to greatly enhance your data entry efficiency. By storing account information from *General Ledger* in *The Raiser's Edge*, you can enter gifts once for both programs, cutting your gift entry time in half.

The Raiser's Edge is designed to offer easy navigation by providing links which give you the ability to quickly access any area of the program. Records are organized by tab in *The Raiser's Edge*. For example, on an individual constituent record, you can enter name, preferred address, and phone number information on the Bio 1 tab. Tabs let you easily organize and access the information you track in your records.

As you familiarize yourself with the program, you will realize the many benefits and features incorporated into this easy-to-use software. Once you put the power of *The Raiser's Edge* to work for your organization, you will find the program to be an invaluable part of your fund-raising success.

The Raiser's Edge Links

The Raiser's Edge offers easy-to-use links to all main areas of the program. Simply click a link on the Raiser's Edge bar on the left side of the screen to go to that particular area of the program. You can also select a link in the **Go** menu.

Home. Your Home page provides you with a central area from which you can access all areas of the program quickly and easily. You can customize your Home page to display those records and functions that you use most frequently. You can create records and open existing ones directly from your Home page.

Records. You can efficiently access and manage all your records, including constituents, gifts, actions, campaigns, funds, and appeals, from one link.

Query. Use this link to define groups of records (such as constituents or gifts) for reports, mailings, exports, business rules and a variety of other functions. You can use filters to establish the criteria records must meet to be included in a particular group. The query then lists the records that meet the criteria. Queries are used throughout the program to filter and group records for numerous functions.

Export. You can send information from *The Raiser's Edge* to other programs, such as your word processor for a mailing, or a spreadsheet for an analysis. You can also use **Export** to create *Crystal Reports*.

Reports. You can use an array of pre-formatted reports to analyze such information as giving trends of your constituents, new donor information, and the effectiveness of your campaigns, funds, and appeals.

Mail. Use this link to create bulk mailings of labels, cards, envelopes, thank-you letters, and many other mailings. You can also export information to other programs such as your word processor or send mailings via electronic mail.

Batch. This link lets you enter gifts or constituents in groups (batches) to speed data entry.

Admin. This link contains *Administration* options you can use to manipulate your data. You can monitor system statistics, import and update data, validate your database, and grant security access to all areas of the program to your users. You can also globally change and delete information to make editing your database easier.

Config. You can set *Configuration* options to control data entry and increase the consistency of your database. You can establish addressees and salutations for your mailings and create attributes to attach important specialized information to all your records. Use Business Rules to create defaults and generate messages throughout the program. You can establish a link between **The Raiser's Edge** and **General Ledger** to maximize the efficiency of the two programs.

Scanning. This link provides access to the optional module *Membership Scanning*, which provides additional functionality for the optional module *Membership Management.* With *Membership Scanning*, you can scan barcodes to retrieve membership information from your **Raiser's Edge** database.

NetSolutions. Use this link to access the optional module *NetSolutions*, the full-featured electronic platform that enables your organization to manage online donations, appeals, events, and more.

Plug-ins. Plug-ins can help you perform various **Raiser's Edge** functions. For example, you can use the Post-Conversion Assistant to help clean up your database after conversion or use the Fund Graph plug-in to monitor the total gift amount for each of your funds.

You can also use the *RE:API for Advanced Application Development* optional module to integrate **The Raiser's Edge** with plug-ins you create. **The Raiser's Edge** can host HTML, Active X, or spreadsheet documents in a wide variety of formats to work in conjunction with the program. You can use this module to customize **The Raiser's Edge** to suit your needs.

Dashboard. *Dashboard* provides a quick and efficient overview of information in your database in an organized presentation. With the click of a mouse, you can view a real-time snapshot of your organization's progress on the Dashboard page. *Dashboard* is ideal for Development Directors, Executives, or any user who needs to quickly access data. Because *Dashboard* does not require a complete working knowledge of **The Raiser's Edge**, it is convenient for infrequent users.

Help. Use this link to access the help file, online documentation, order form for printed materials, and Blackbaud Web page. You can also email Blackbaud Customer Support directly from this link.

Optional Modules

You can select optional modules to customize **The Raiser's Edge** to meet the specific demands of your organization.

Alumni Tracking. *Alumni Tracking* is designed for educational organizations. It provides additional information and reporting capabilities to help you contact, solicit, and better manage your alumni constituents.

RE:API for Advanced Application Development. The *API* optional module gives you the ability to host HTML, Active X, or spreadsheet documents in a variety of formats to work in conjunction with **The Raiser's Edge**. You can use this module to customize **The Raiser's Edge** to suit your needs.

Electronic Funds Transfer. *Electronic Funds Transfer* gives you the ability to quickly and easily process contributions made by automatic bank debit or credit card.

Event Management. *Event Management* helps you plan, organize, and implement all stages of your fund-raising events. It provides a central location for all your event information, including registrant lists, expenses, and income generated.

PostalSaver. *PostalSaver* presorts envelopes and labels per postal regulations; ensures address quality; and prints required postal reports, bar-coded address labels, and sack and tray tags. Additionally, Blackbaud's CASS-certification subscription service, AddressAccelerator, works within *PostalSaver* to automatically standardize spelling, abbreviations and punctuation, and add ZIP+4 and carrier-route information to your addresses.

Membership Management. *Membership Management* gives you the ability to track multiple memberships, produce reports to analyze membership activity, and print lists and directories of members. You can also perform additional mailing functions such as preparing membership cards and renewal notices.

Membership Scanning. *Membership Scanning* is additional functionality available with the optional module *Membership Management*. With *Membership Scanning*, you can scan barcodes to retrieve membership information from your *Raiser's Edge* database. *Membership Scanning* is ideal if your organization distributes and uses membership cards for anything from entrance to your museum, zoo, or an event, to discounts at your gift shop.

MatchFinder. *MatchFinder* is a database, separate from *The Raiser's Edge*, that includes information about matching gift companies. You can integrate the *MatchFinder* database to use with *The Raiser's Edge*, or you can use the database on its own. *MatchFinder* provides you with an innovative approach to tracking matching gift companies.

NetSolutions. The *NetSolutions* optional module is a full platform of components that work together to connect you with your donors. 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.

RE:Queue for Task Scheduling. *RE:Queue for Task Scheduling* gives you the ability to set up a series of tasks to run automatically and unattended. Because you create queues to work with large amounts of data, you can schedule the queue to export, print, or run during a break in the day or when all your volunteers and employees have left for the day.

Prospect Research Management. *Prospect Research Management* provides you with additional tools to track financial information about prospects and potential major donors. You can also import this information directly from outside research agencies.

Honor/Memorial Tracking. *Honor/Memorial Tracking* gives you the ability to track donations made in honor, memory, or celebration of someone. Specialized reports help you track who is being honored, celebrated, or memorialized, the donor, and who should be acknowledged for the gift.

RE:VBA for Advanced Customization. The *VBA* optional module lets you use programming code to perform a variety of functions, such as showing custom forms and performing quick mail merges, directly from *The Raiser's Edge*.

Volunteer Management. *Volunteer Management* enables you to track a wide variety of information for your volunteers. For example, you can maintain online time sheets, define hours of availability, create assignments, and log volunteer qualifications. This module also provides you with additional reports to evaluate the effectiveness of your volunteers.

RE:Anywhere for Remote Access. *RE:Anywhere for Remote Access* enables remote, home, roving and occasional users of *The Raiser's Edge* to conduct the majority of fundraising and relationship activities remotely. With *RE:Anywhere for Remote Access* you can view, enter, edit and delete information in your *Raiser's Edge* database from your laptop computer when traveling or at home.

The Raiser's Edge Documentation

A wide assortment of documentation is available to help you understand and use *The Raiser's Edge*. All user guides are viewed through a series of PDF (Portable Document Format) files accessed from the program or directly from the User Guides page of the Blackbaud Web site at www.blackbaud.com. For more information, see "User Guides" on page 6.

Additionally, you can use *The Raiser's Edge* help file to quickly locate conceptual information and procedures while you use *The Raiser's Edge*. For more information, see "Help File" on page 6.

For information about accessing the online documentation, see "Accessing the Help File and User Guides" on page 5.
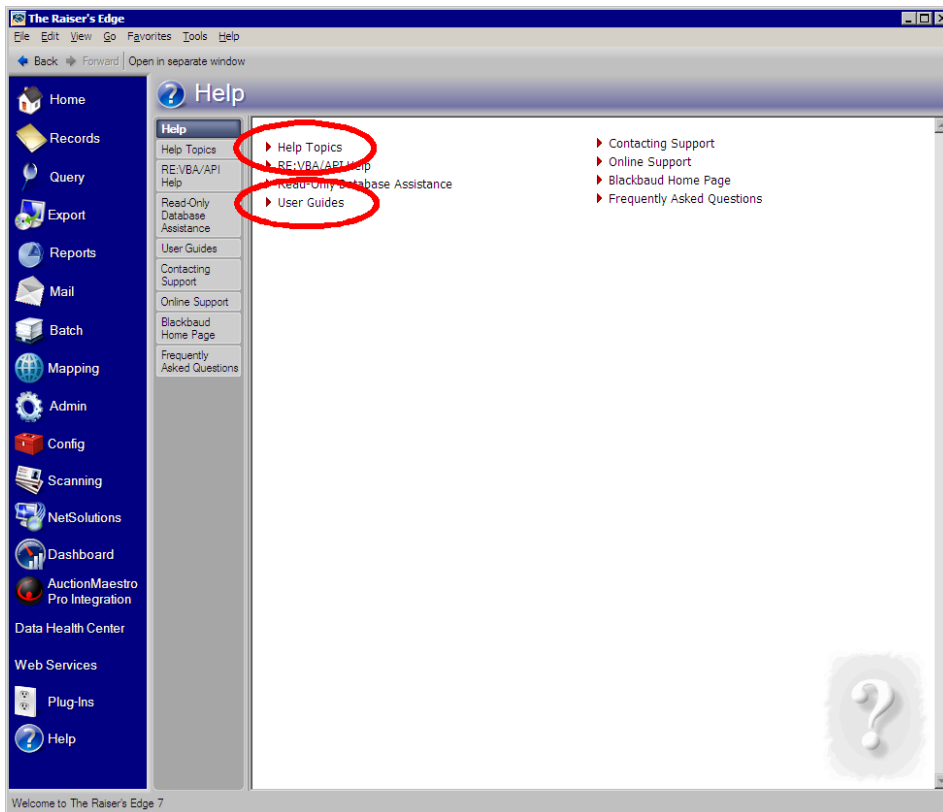
Accessing the Help File and User Guides

You can access the help file and user guides by selecting **Help**, **The Raiser's Edge Help Topics** or **Help**, **User Guides** from the menu bar.
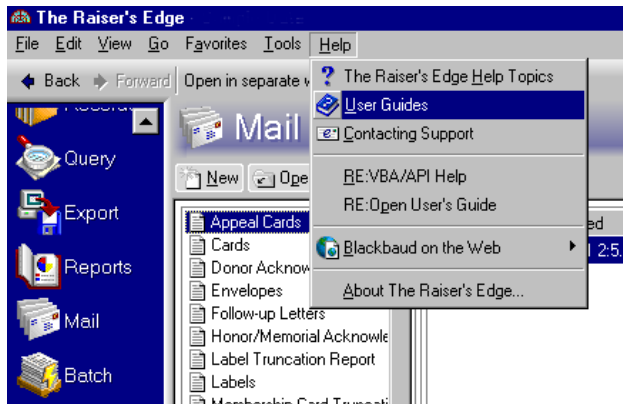
You can also access the help file and user guides by clicking **Help** on the Raiser's Edge bar on the left side of the screen.
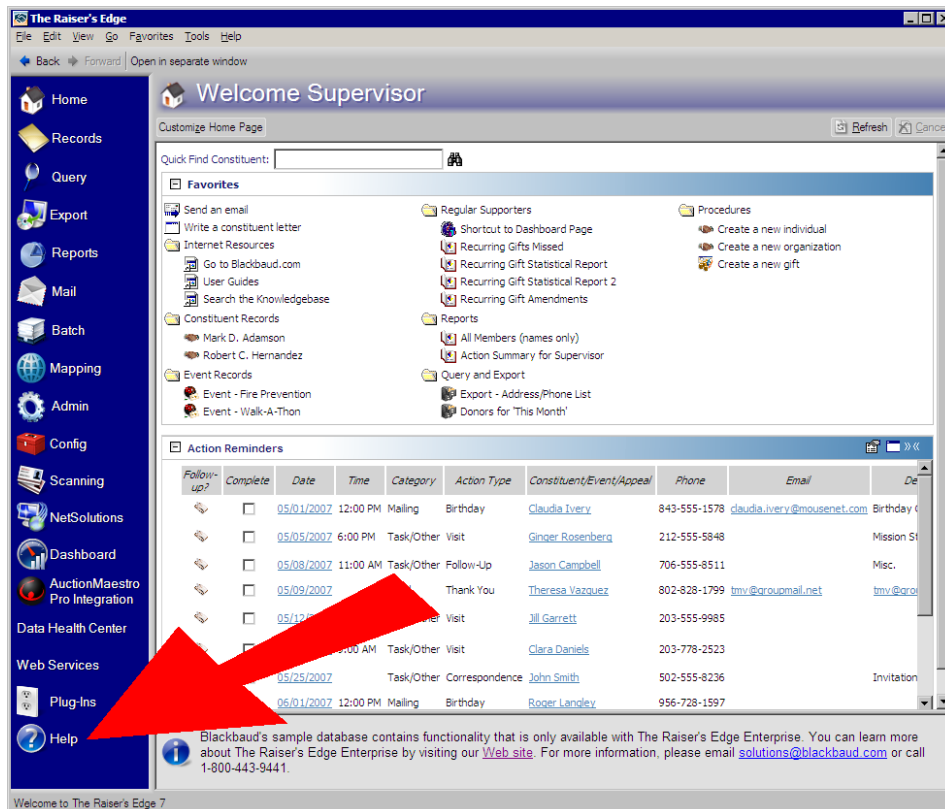
The Help page appears. Click either **Help Topics** or **User Guides**.

Note: You can press **F1** on your keyboard from any screen in the program to access the help file topic for that screen.

Additionally, you can press **F1** on your keyboard from any screen in the program to access the help file topic for that particular screen.

Help File

Online documentation included with the program consists of a help file made up of several main parts, including a Table of Contents, Index, and Search tab.

The online help file in *The Raiser's Edge* is specially designed to place a wide variety of documentation resources at your fingertips while you use the program. You can access many different types of information: conceptual and reference information, a glossary of terms used throughout *The Raiser's Edge*, procedures, and notes you can define to address situations unique to your organization.

If you need resources beyond those appearing in the help file, you can access the online documentation which contains all the printed documentation.

User Guides

All *Raiser's Edge* user guides are viewed through a series of PDF (Portable Document Format) files accessed from the program or accessed directly from the User Guides page of the Blackbaud Web site at www.blackbaud.com.

To view PDF files, you can use Adobe Acrobat Reader, which automatically installs with *The Raiser's Edge*.

When you select **Help**, **User Guides** from the menu bar anywhere in the program, the User Guides page appears. You can also click **Help** on the Raiser's Edge bar and then click **User Guides**. The User Guides page contains links to all PDF files.

> **Note**: Using the online order form, you can order printed, spiral bound copies of the documentation. You can access the order form by clicking **Help** on the Raiser's Edge bar or by selecting **Help**, **User Guides** from the menu bar.

Using the online order form, you can order printed, spiral bound copies of the user guides. You can access the online order form by clicking **Help** on the Raiser's Edge bar or by selecting **Help**, **User Guides** from the menu bar. You can also purchase printed copies by sending an email to manualrequest@blackbaud.com. For more information about the Raiser's Edge bar and menu bar selections, see the Program Basics chapter of this guide.

Additional Resources

On our Web site, www.blackbaud.com, you can find an array of additional information sources. We encourage you to bookmark this site and visit it often. If you participate in our maintenance program, you can enter the Customer Support section from the main Web site. The Customer Support site includes support tips, executable files you can download, a place where you can submit software suggestions, and much more.

To answer frequently asked questions about *The Raiser's Edge*, we offer a Knowledgebase on the Customer Support Web site which you can use to find solutions to any problems you may experience.

We have set up an online discussion group for users of *The Raiser's Edge*. This forum enables you to ask questions of, and share ideas with other *Raiser's Edge* users via email. To subscribe to this group, send an email to Listserv@list.blackbaud.com. In the body of the email (leave the subject line blank), type the following (without quotation marks) "Subscribe RE_Forum FirstName LastName OrganizationName State/Country". Do not include any punctuation and delete any autosignatures your email may have because the list server will not recognize them. If you want to reduce the volume of email you receive, you can search and discuss *Raiser's Edge* issues on our Web forum. On the Web forum, you can post questions and previous conversations are archived. On the Customer Support section of our Web site, you can also open support cases with our Case Central Web interface.

You can send technical inquiries via email to RESUPPORT@blackbaud.com. If you need to speak to a customer support analyst, you can call our support hotline at 1-800-468-8996. Be sure to include your name, organization name, state/country, and telephone number.

Documentation Conventions

Our documentation follows certain conventions intended to provide a consistent format so you can focus on the information contained in the manual rather than its style. All manuals are printed in a two column format. The smaller of the two columns contains notes, tips, timesavers, and warnings. The main column provides conceptual information and procedures, many of which contain scenarios using real-life examples.

Note:	Designates a note or tip related to the information in the main text column.
Tip:	Designates a shortcut or timesaving action.
Warning:	Designates a warning.
Note:	Designates a scenario, a short explanation of a procedure using actual examples, in the main text column.

You can use the extra space provided in the notes column to write helpful general information or notes specific to your organization.

Text Formatting

Format	Denotes
Bold	The name of a field, frame, checkbox, or button. For example, **Name** is a field used on records.
Italics	A program module name. For example, *Event Management* is a module name.
Bold Italics	A Blackbaud program name. For example, ***The Raiser's Edge*** is a program name.
small caps	A key on the keyboard. For example, DELETE is a key on your keyboard.
key + key	Press the keys simultaneously. For example, when instructed to "Press CTRL + F" you press and hold the Control key, then press F.
key, key	Press the keys in the order in which they appear. For example, when instructed to "Press A, F" you press the A key, release it, and then press the F key.

Using the Raiser's Edge Documentation and Help File

Procedures

Using the Portable Document Format (pdf) created by *Adobe Acrobat*, you can access the user guides for *The Raiser's Edge*. On your installation CD is a copy of *Adobe Acrobat Reader* 5.05, which Adobe allows us to distribute freely. With *Acrobat Reader*, you can easily navigate through the user guides and print individual pages or entire documents on demand.

If you do not already have *Adobe Acrobat Reader*, you must install it before you can view the user guides. After you install *Adobe Acrobat Reader*, you can view user guides before you install *The Raiser's Edge*. They are always available by selecting **Support**, **User Guides** from the menu bar of the Blackbaud Web site at www.blackbaud.com. We strongly recommend you print and read a copy of the *Installation Guide* before you install *The Raiser's Edge*. After you install *The Raiser's Edge*, the user guides are accessible from any area of the program by selecting **Help**, **User Guides** from the menu bar, or by clicking **Help** on the Raiser's Edge bar.

Quick Tips for Using PDFs

This section offers a few tips on how to get the most out of the pdf versions of *The Raiser's Edge* user guides.

- The page number by each entry in the Table of Contents is a hyperlink. Click the page number to go directly to that section.
- Page numbers by index entries are also hyperlinks. Click a page number by an index entry to go directly to that section.
- Each chapter contains a separate Table of Contents for information in that chapter only. Each page number in the chapter Table of Contents is also a hyperlink.
- Chapter Table of Contents contain a list of procedures covered in that chapter. Click a page number to go directly to that procedure.
- If you are not sure which guide contains the information you need, click **Which Guide Should I Read?** on the User Guides page. This opens a document which contains a breakdown of which guides would be helpful based on your job tasks. For more information about the User Guides page, see "Accessing the User Guides" on page 10.

Accessing the User Guides

To access the user guides, select **Help**, **User Guides** from the menu bar in any area of the program. The User Guides page of the Blackbaud Web site appears. You can also access the user guides by clicking **Help** on the Raiser's Edge bar. From the User Guides page, you can navigate into any of the user's guides for *The Raiser's Edge*.

Accessing the User Guides From The Raiser's Edge Shell

*The Raiser's Edge* shell provides a central location for you to access any area of the program, including the user guides. You can access the user guides by clicking **Help** on the Raiser's Edge bar or by selecting **Help**, **User Guides** from the menu bar.

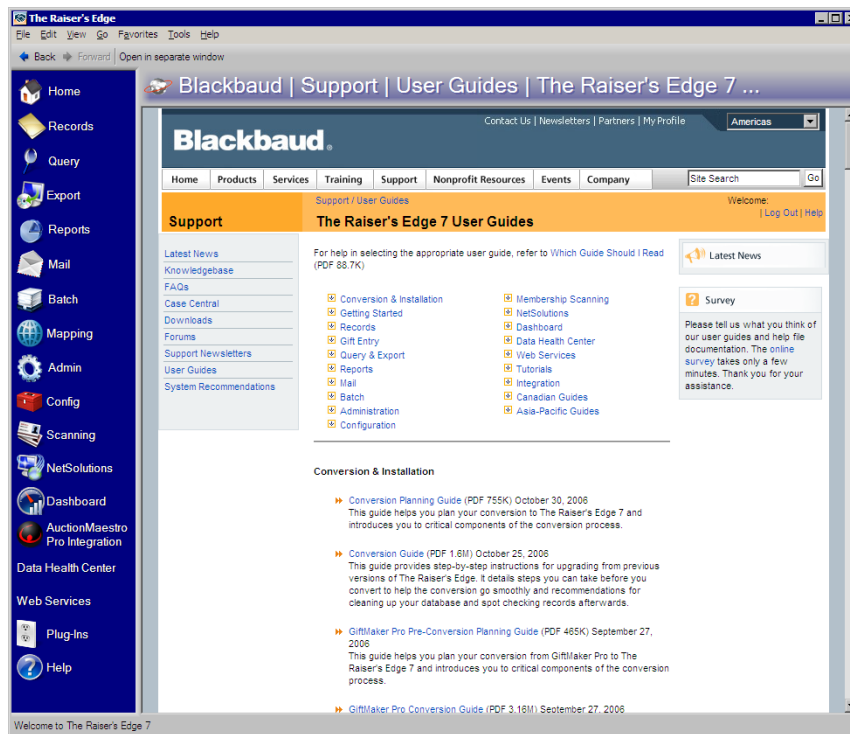▶ **Accessing user guides from the Raiser's Edge bar**

  1. On the Raiser's Edge bar, click the **Help** button near the bottom of the screen.
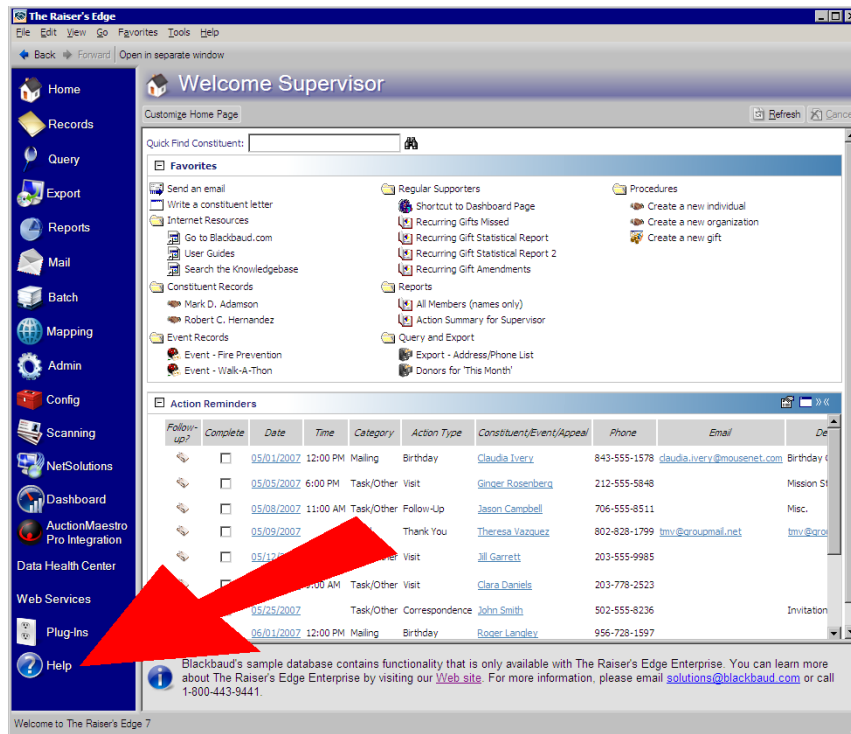

The Help page appears.
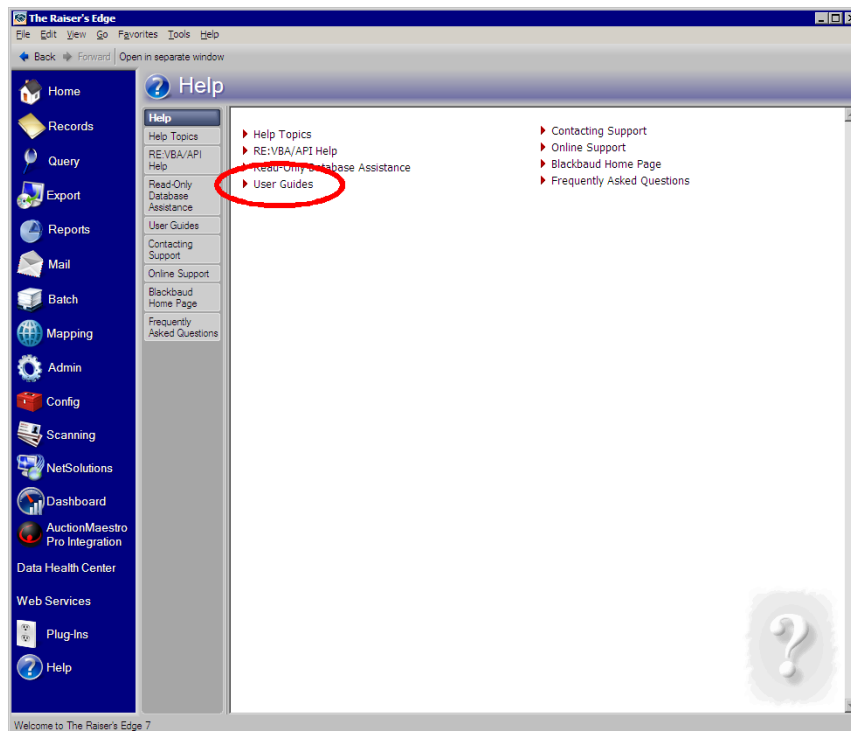
2. Click the **User Guides** link. The User Guides page of the Blackbaud Web site appears. If you are not already logged into the Blackbaud Web site, you must first enter your user name and password.

3. The user guides are grouped under headings by topic, such as **Conversion & Installation**, **Getting Started**, **Records**, and **Gift Entry**. Click the name of the heading to see all user guides listed under it. To open a guide, click a user guide title. The document opens in *Adobe Acrobat Reader*. For information about navigating in *Acrobat Reader*, see "Using Acrobat Reader" on page 13.

▶ **Accessing user guides from the menu bar**

1. From anywhere in *The Raiser's Edge*, select **Help**, **User Guides** from the menu bar. The User Guides page of the Blackbaud Web site appears. If you are not already logged into the Blackbaud Web site, you must first enter your user name and password.
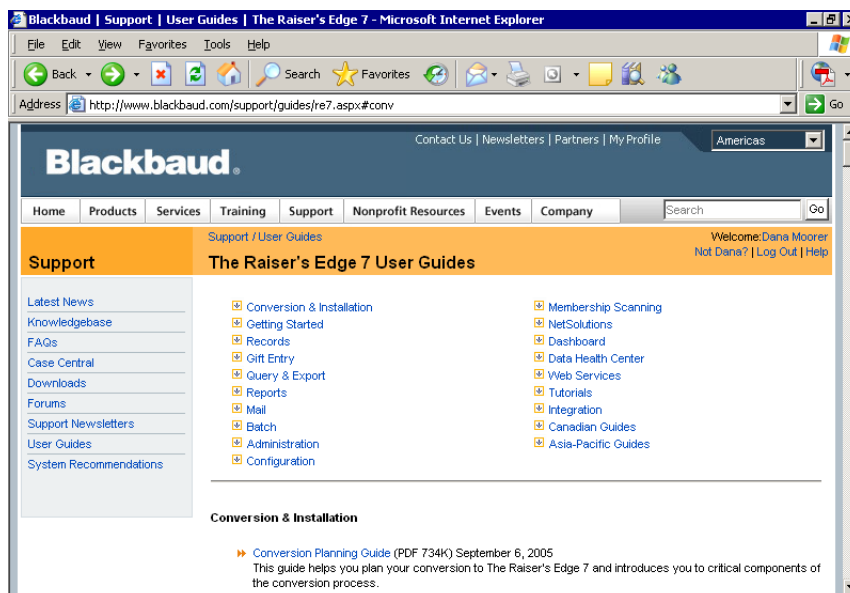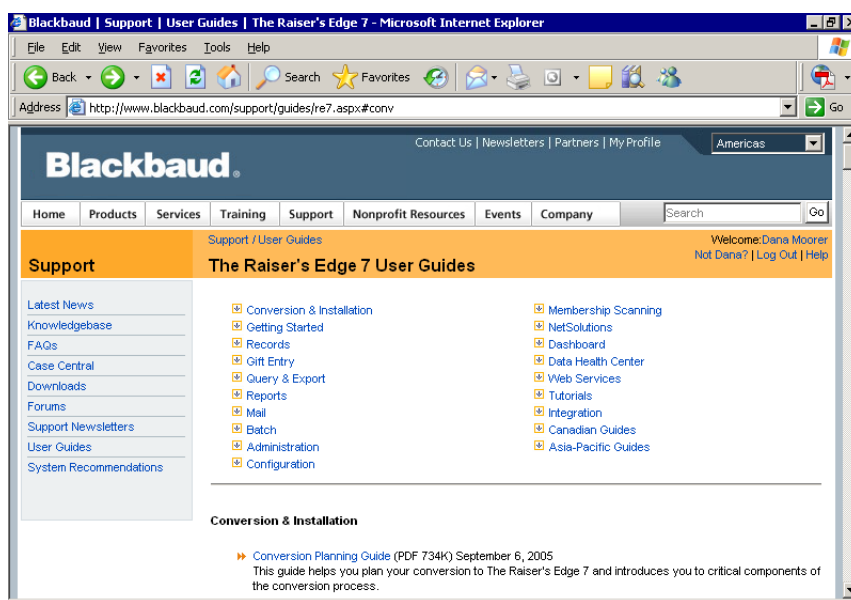
2. The user guides are grouped under headings by topic, such as **Conversion & Installation**, **Getting Started**, **Records**, and **Gift Entry**. Click the name of the heading to see all user guides listed under it. To open a guide, click a user guide title. The document opens in *Adobe Acrobat Reader.* For information about navigating in *Acrobat Reader*, see "Using Acrobat Reader" on page 13.

Web Access to the User Guides

You can always access the latest and most up-to-date user guides from the Blackbaud Web site at www.blackbaud.com.

▶ **Accessing user guides without logging into The Raiser's Edge**

1. To access all up-to-date user guides, select **Support**, **User Guides** from the menu bar of the Blackbaud Web site.

2. Click the link for **The Raiser's Edge 7**. The User Guides page appears.

3. The user guides are grouped under headings by topic, such as **Conversion & Installation**, **Getting Started**, **Records**, and **Gift Entry**. Click the name of the heading to see all user guides listed under it. To open a guide, click a user guide title. The document opens in *Adobe Acrobat Reader.*

Using Acrobat Reader

When you open a user guide in *Acrobat Reader*, a list of bookmarks appears on the left of the document. These bookmarks are links to various areas in the document.

You can easily navigate in the guides using the bookmarks, toolbar, and scroll bar. Beneath the menu bar at the top of the window is the toolbar; at the bottom left of the window is the status bar. At the right of the window is a vertical scroll bar that enables you to scroll up and down through a document. The overview area of the window includes an independent scroll bar that you can use to scroll through bookmarks.

Bookmarks

Click the bookmark name to go to the topic represented by that bookmark. Bookmarks with a plus sign to the left have additional bookmarks. Click the plus sign beside a bookmark to show additional bookmarks. Bookmarks with a minus sign to the left are already displaying any additional bookmarks. Use the bookmarks to move from chapter to chapter in a document.

Printing

You can print all or selected pages of a document by opening it in *Acrobat Reader* and selecting **File**, **Print** or pressing CTRL+P on your keyboard.

Acrobat Reader Toolbar

Click the **Show/Hide Navigation** button to view or hide the bookmark window on the left.

Use the **Hand** tool to move a document page on-screen when it does not fit within the window. Drag the hand tool in the direction you want to move the page.

Use the **Zoom In** tool to magnify the page display by a factor of 2.

Use the **Text Select** tool to select text in a document, which can then be copied to the Clipboard using the **Copy** command. Choose **Select Graphics** from the **Tools** menu to select graphics in a document.

Click the **First Page** button to return to the first page of a document.

Click the **Previous Page** button to go back one page in a document.

Click the **Next Page** button to go forward one page in a document.

Click the **Last Page** button to advance to the last page of a document.

Use the **Previous View** button to retrace your steps in a document, scrolling back through the previous views visited one at a time. **Previous View** also returns you to the original document after you click a bookmark that links you to another document.

The **Go to Next View** button works in conjunction with the **Previous View** button to scroll through views visited in a document.

Click the **Fit in Window** button to scale the page to fit within the window.

Click the **Fit Width** button to scale the page width to fill the width of the window. Clicking this button while pressing the CTRL key on your keyboard fills the window with only the visible text and graphics on the page.

Use the first **Rotate View** button to rotate the page 90% counter clockwise.

Use the second **Rotate View** button to rotate the page 90% clockwise.

Use the **Find** tool to search for part of a word, a complete word, or multiple words in a document.

Status Bar Fields and Controls

The **Window Splitter** adjusts the width of the overview and document areas. Drag the control to where you want to divide the two areas. For example, drag the window splitter to the right to view the bookmark names in their entirety.
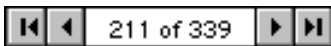
The **Page Number Box** displays the current page number and lets you go to a specified page in a multi-page document. Click the page number box to display the Go to Page dialog box.
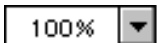
The **Magnification Box** displays the current page magnification and lets you select various magnifications.
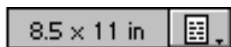
The **Page Size Box** shows the size of the current page using the units specified in Acrobat Preferences.

# Text Search

You can click the binoculars or press CTRL+F on your keyboard to search for part of a word, a complete word, or multiple words in a document.

Note: You can only search for text within each individual PDF file. For example, if you have the *Program Basics Guide* open, the **Find** tool only searches that document, not the *Constituent Data Entry Guide*.

▶ **Performing a text search**

1. With a PDF file open, click the binoculars in the toolbar or press CTRL+F on your keyboard. The Find screen appears.
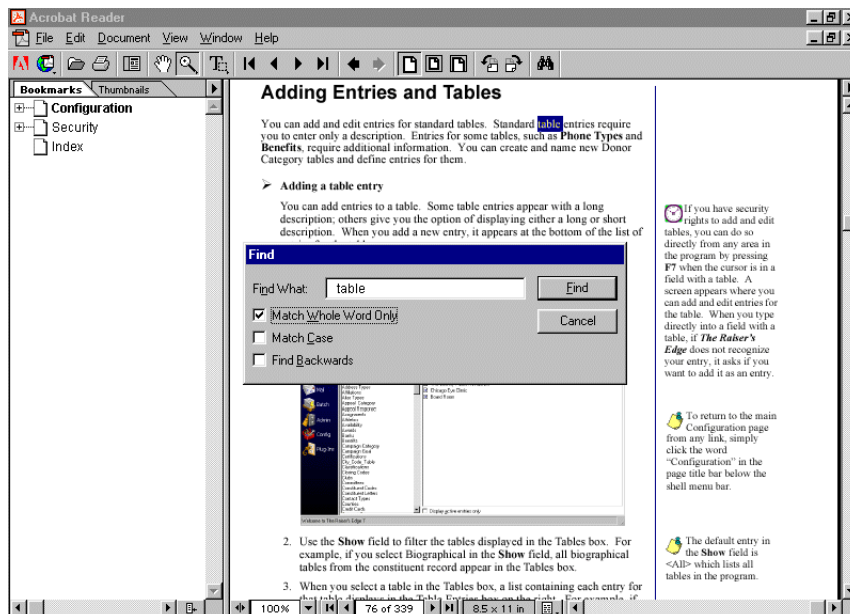
2. In the **Find What** field, enter the word or words for which you are searching.

3. Mark the checkboxes if you want the search to **Match Whole Word Only** and **Match Case**. Mark the **Find Backwards** checkbox if you want the search to begin on the current page and proceed backwards through the document.

4. Click **Find**. The first occurrence of the text meeting your search criteria is highlighted.

Accessing the Help File

The help file is designed to give you quick answers; it contains a table of contents, index, and search features that enable you to find information about all facets of *The Raiser's Edge*.

You can access the help file by selecting **Help**, **The Raiser's Edge Help Topics** from the menu bar or clicking **Help** on the Raiser's Edge bar and selecting **Help Topics**. Or, to open the help file to a specific topic with information about the screen in the program you are currently on, press **F1** on your keyboard.

Quick Tips for Using Help

• Press the **F1** key from anywhere in *The Raiser's Edge* to open a help topic with information about the specific screen you are currently on in the program.

• When using the Search tab, place search phrases in quotation marks to reduce the number of "hits." For example, if you search for the phrase "pledge reminder" (including the quotation marks), only topics containing the phrase appear in the results. If you leave out the quotation marks, the search results include topics that contain both individual words instead of the actual phrase.

The HTML Help Viewer

When you access the help file, the HTML help viewer appears.
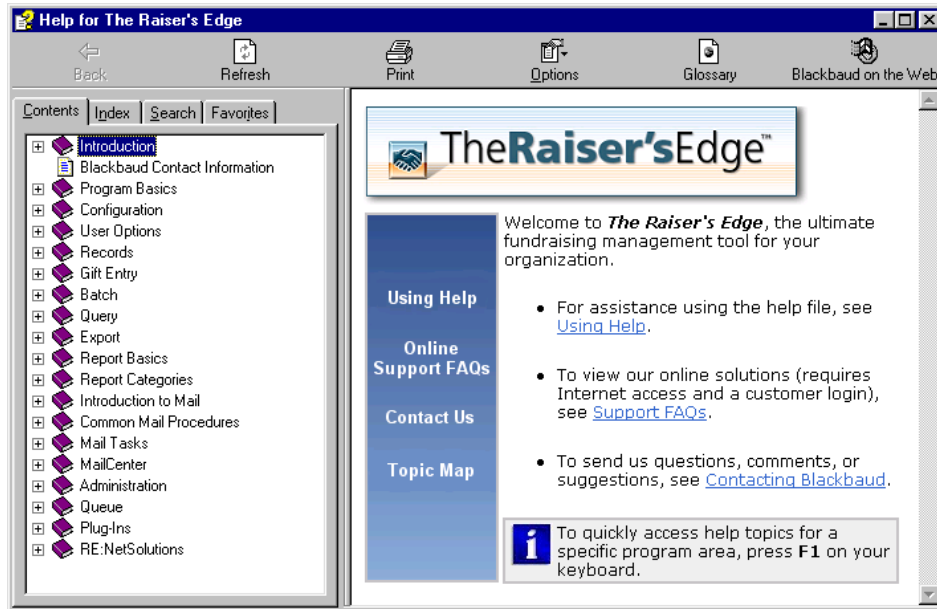
When viewing help, you can click and drag a corner of the viewer window to resize it. Click and drag the window by the title bar to move it around on your screen.

The tabs on the left of the viewer are for quick access to topics, such as an indexed list of topics and a table of contents for topics, plus search capabilities and a customizable list of your favorite or most-visited topics.

Just like a Web browser, the HTML Help viewer includes a Back button for navigating to the previous topic or page. The **Glossary** button opens a glossary similar to one you'd find in a printed publication. It provides a list of words and short phrases, and their definitions, related to *The Raiser's Edge.* The **Options** button opens a menu with a variety of options. The **Blackbaud on the Web** button accesses the Blackbaud Web site.

Tabs in the Help File

The left side of the help viewer contains a number of tabs to help you navigate and locate information.

Contents

The Contents tab displays books and pages representing categories of information in the help file. When you click a closed book, it opens to display its contents (sub-books and pages). When you click an open book, it closes. When you click pages, you select topics to view in the right-hand pane of the HTML Help viewer.

Index

The Index tab displays a multi-level list of keywords and keyword phrases. These terms are associated with topics in the help file. They are intended to direct you to specific topics according to your way of working. To open a topic in the right-hand pane associated with a keyword, select the keyword and then click **Display**. If the keyword is used with more than one topic, a Topics Found screen appears where you can select a specific topic to view.
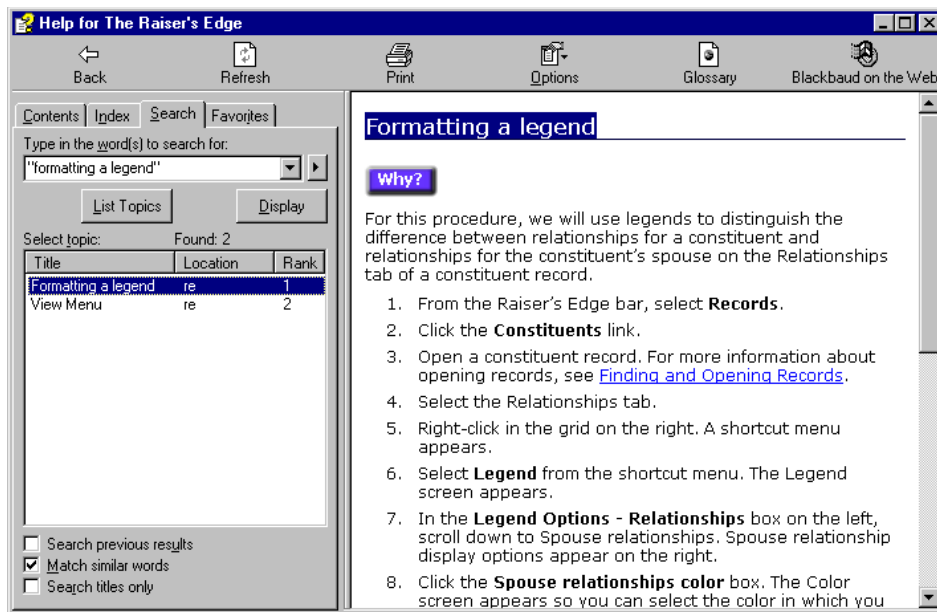
Search

The Search tab gives you the ability to search for specific words in the help file and locate topics containing those words. Full-text searching looks through every word in the help file to find matches. You can also search previous results, find similar words, and search only topic titles. When the search is completed, a list of topics is displayed so you can select a specific topic to view.

Favorites

You can store a list of your favorite or most frequently used help topics. Whenever you open the help file for *The Raiser's Edge*, you can quickly go to the topics you view most often by selecting them from this tab. It's simple to add topics as favorites — when an interesting topic is displayed in the right-hand pane, just select the Favorites tab and click **Add**. You can update the list at any time by removing topics you no longer want included as favorites.

Using Full-Text Search

Use the Search tab to find information in the help file.

A basic search consists of the word or phrase you want to find. Keep these rules in mind for full-text searches:

• Searches are not case-sensitive.
• You can search for any combination of letters and numbers.
• Punctuation marks such as period, colon, semicolon, comma, and hyphen are ignored during a search.

Checkboxes and Buttons on the Search Tab

You can mark several checkboxes to help determine the results of your search:

• Mark the **Search titles only** checkbox if you want to look for your search phrase only in topic titles.
• Mark the **Match similar words** checkbox if you want the search to find words similar to your search term.
• If you have already conducted a search and want to search from within only the results of that search, mark **Search previous results** and conduct another search.

- If you want all instances of your search term found in a topic to be highlighted, from the menu bar, select **Options**, **Search Highlight On**.

After you conduct a search, click the **List Topics** button and select the topic you want to view. Click **Display** to view the topic.

To sort the search results alphabetically, click the **Title** column heading; to sort by the number of times your search phrase appears in a topic, click the **Rank** column heading. The **Location** of all topics is the same, so clicking this column heading does not resort the results.

Search Words, Phrases, and Wildcard Expressions

You can search for words or phrases. Group the elements of your search using double quotes or parentheses to set each element apart. You cannot search for quotation marks. Wildcard expressions allow you to search for one or more characters using a question mark or asterisk. For example:

- Single word – if you search for the word mail, the results of your search will include topics that include the word as well as variations of the word such as "mailings."

- Phrase – if you search for the phrase "pledge reminder" (including the quotation marks), topics containing the literal phrase "pledge reminder" and all its grammatical variations appear in the results. If you leave out the quotation marks, the search results include topics that contain both individual words instead of the actual phrase. This is equivalent to using a Boolean search of "pledge AND reminder". We will discuss Boolean searches below.

- Wildcard Expressions – You can use * as a substitute for parts of a word and ? as a substitute for a single character. For example, a search for install* would yield topics containing the terms "install," "installation," "installing," and so on. A search for state abbreviations using "S?" would return SC and SD.

Boolean Operators

These operators enable you to precisely define your search by creating a relationship between search terms. To access the Boolean operators, click the right arrow beside the search field, or just type the operator directly into the search field.
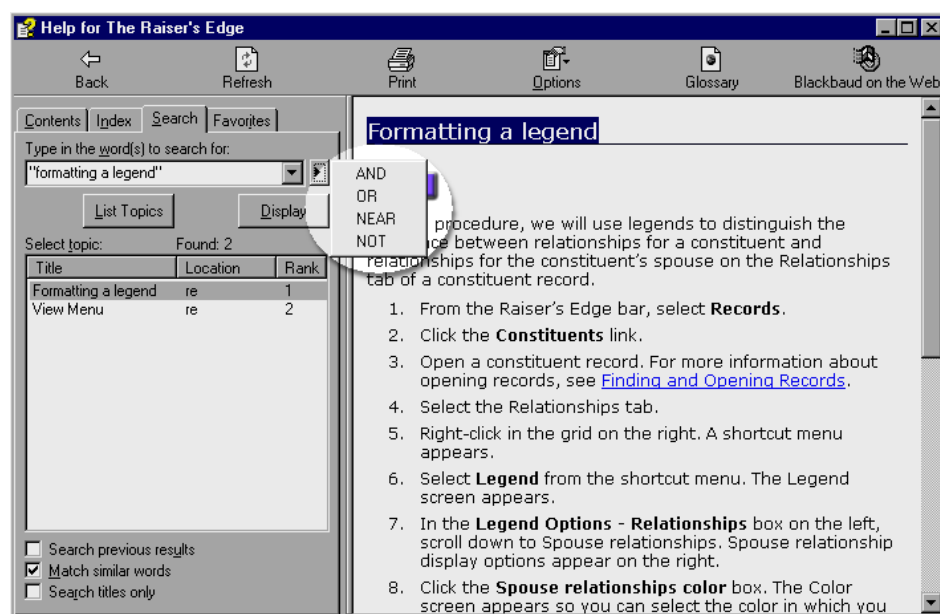
You can use these Boolean operators in your searches:

Note: The |, &, and ! characters do not work as Boolean operators (you must use OR, AND, and NOT).

- AND – searches for both terms in the same topic. For example, if you enter merge AND query in the search field, topics containing both the words "merge" and "query" would appear as results. If no operator is specified, AND is used. For example, the query "donor acknowledgement letter" is equivalent to "donor AND acknowledgement AND letter."

- OR – searches for either term in a topic. For example, if you enter preferences OR options in the search field, topics containing either the word "preferences" or the word "options" (or both) appear as results.

- NOT – searches for topics containing the first term without the second. For example, if you enter gift NOT cash in the search field, topics containing the word "gift," but not the word "cash" appear as results.

- NEAR – searches for topics with both words appearing within eight words of each other. For example, if you enter pledge NEAR payment in the search field, topics containing the word "pledge" within eight words of the word "payment" appear as results.

Program Basics

Procedures

This chapter is designed to familiarize you with includes screens, buttons, menu options, and terms used throughout *The Raiser's Edge*. The items described in this chapter include standard parts of a screen, toolbar buttons, standard screen buttons, menu options, function keys, and common procedures. By reading "Program Basics," you can become familiar with the screens, tools, and commands you will use to navigate *The Raiser's Edge*.

You can find more detailed information about specific areas of the program in the individual topic chapters in each of *The Raiser's Edge* user manuals.

Navigating in The Raiser's Edge

The Raiser's Edge provides you with a wide variety of tools to make navigating in the program quick and easy. *The Raiser's Edge* houses all areas of the program in one shell, providing a seamless Web page feel and enabling you to move from one area of the program to another with a single click of the mouse.

Shell

The shell provides a central area where you can enter all main areas of the program. When you click a link for an area, it appears as a page in the shell. By default, *The Raiser's Edge* opens to the Home page. For more information, see "The Raiser's Edge Home Page" on page 36. From User Options you can select another page as the default opener. Each shell page contains several elements which are referred to frequently in the documentation for *The Raiser's Edge*.
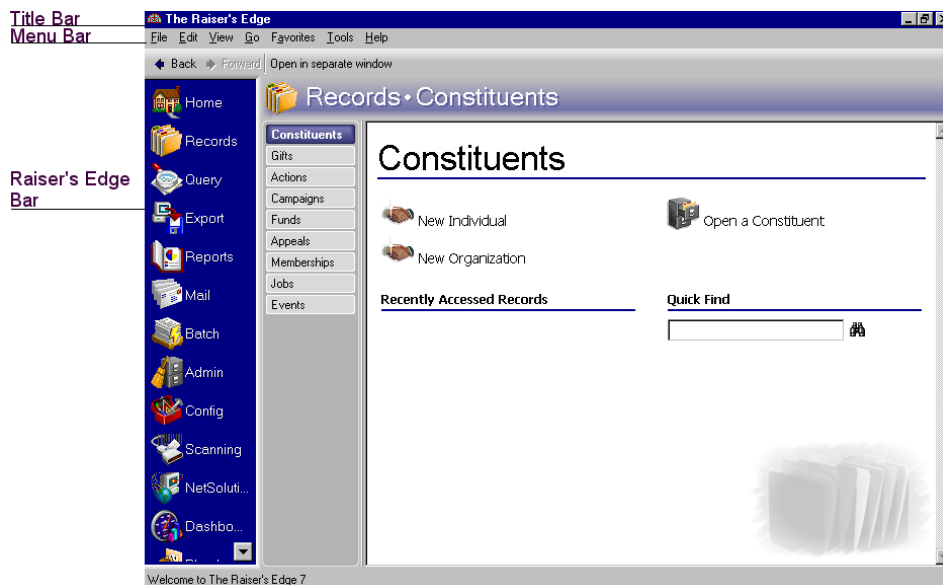
The Raiser's Edge bar on the left side of the screen contains links to all main areas of the program. When you click a link, that area displays as a page in the shell. You can use the **Back** and **Forward** buttons to navigate through pages you have visited. The **Open in a separate window** button enables you to open a page outside the shell. When you are on a shell page that contains multiple areas, a series of buttons is available on the left to access each area. For example, in Records, a button is available for each type of record. You can right-click on the buttons to align them to the right, top, or bottom of the screen.

The title bar at the top of the screen includes the name of the program on the left, and buttons to minimize, maximize, and close the program on the right. The menu bar under the title bar contains commands for various functions throughout the program. The available commands depend on the area of the program you have open.

Parts of The Raiser's Edge Record Screen

Many screens in **The Raiser's Edge** contain the same standard parts (some of which appear on your Home page). To navigate easily through the program, you must understand these parts. The screen below shows relationships for an individual constituent.
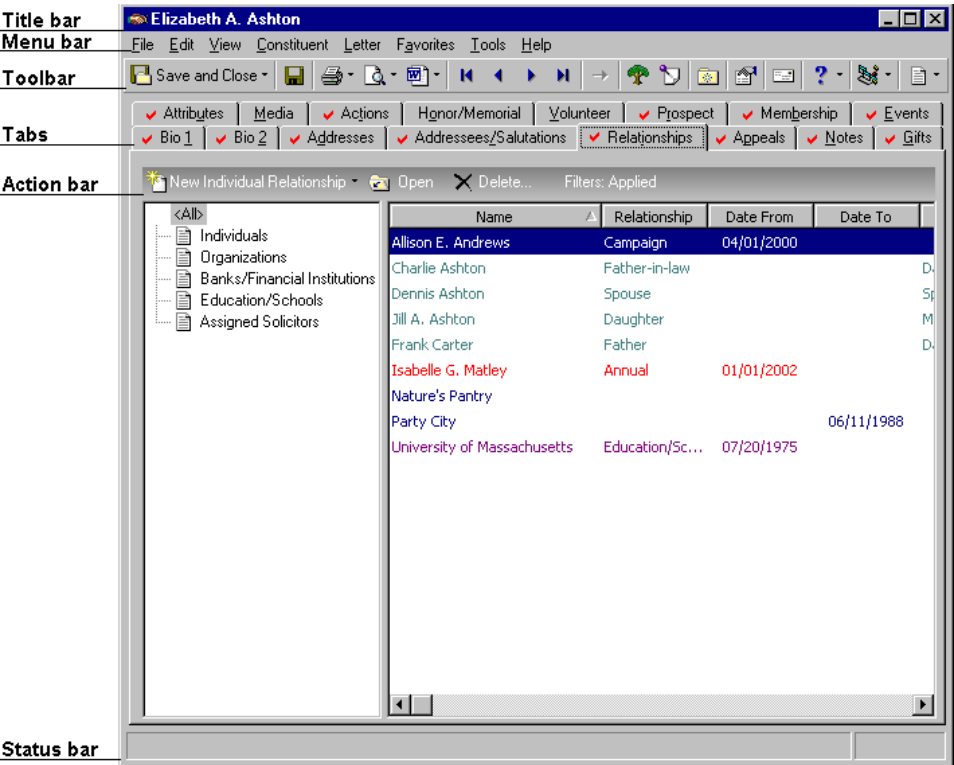
Title Bar

> **Note**: On the Records tab of User Options, you can determine the format for how names display on the title bar. If you have security rights, you can access User Options by selecting **Tools**, **User Options** from the menu bar.

When you open a record, the title bar across the top of the screen displays the actual name of the record. For example, if you open Elizabeth Ann Ashton's constituent record, her name appears in the title bar. You can determine the format of constituent names in the title bar on the Records tab of User Options. Some records, such as campaigns, funds, and appeals, display by either description or ID, depending on your selection in User Options. Like the program title bar, the right side of the record title bar has buttons to minimize, maximize, and close the screen.

Menu Bar
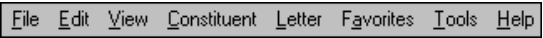
The menu bar, which appears just below the title bar, lists commands for *The Raiser's Edge* functions. *The Raiser's Edge* has several basic menu options available in most areas of the program: **File**, **Edit**, **View**, **Favorites**, **Tools**, and **Help**. When you select a command from the menu bar, a submenu appears listing options for the selected command. Some areas of *The Raiser's Edge* have additional menu options which are discussed in the documentation for that specific area. To access a command on the menu bar, either:

8   Position the pointer over the desired command and
     click the left mouse button.

     or

7   Press **ALT** + the underlined letter. For example, to access
     the **File** menu, press **ALT** + **F**.

Toolbar

The toolbar contains buttons representing commands common throughout *The Raiser's Edge*. You can use these buttons as alternatives to menu commands to save time during data entry. If you have security rights to change your user options, you can select to view tooltips that explain the function of each toolbar command. Tooltips appear when you hold your cursor (hover) over each item in the toolbar. For more information, see the General section of the "User Options" chapter of this book.
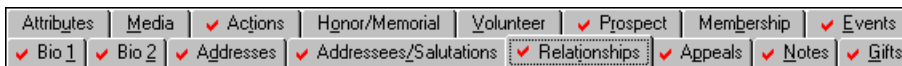
Tabs

> **Note**: Tabs and menu items can have the same "accelerator" key (the letter key you press along with **ALT** to access the item). In these cases, press **ALT** and the letter simultaneously on your keyboard to access the tab. To access the menu item, press and release **ALT**, then press the letter.

Records in *The Raiser's Edge* are divided into tabs. Like tabs on folders in a filing cabinet, these tabs help you organize information in your records. For example, the individual constituent record includes Bio 1 and Bio 2 tabs for storing biographical information. You can access information by clicking the tab. On your keyboard, you can also select a tab by pressing **ALT +** the underlined letter in the tab name. For example, you can access the Attributes tab either by clicking it or by pressing **ALT +** u. If you have security rights to change your user options, you can set them so that tabs containing data appear with a check mark when you open a record. This enables you to analyze which tabs contain data at a glance instead of accessing each individually. For more information, see the Records section of the "User Options" chapter of this book.

Action Bar

Many record screens contain an action bar which provides a centralized location for you to perform actions such as adding, editing, or deleting records. For example, on the Relationships tab, the action bar appears directly beneath the tabs and contains a command to add a **New Individual Relationship**. If you click the down arrow beside **New Individual Relationship**, a drop-down menu appears where you can select another type of relationship to create. This action bar also contains commands to **Open** an existing relationship, **Delete** a relationship, and **Filter** the relationships that appear on the screen.

Status Bar

Press F7 for table lookup	

Note: Even if the status bar is not present on a screen, you can still use function keys to access entries for tables or to enter dates in date fields.

The status bar appears across the bottom of the window and acts as a guide throughout *The Raiser's Edge*. As you use the program, important messages display in the status bar. For example, when you place the cursor in a field that has a lookup available such as the **State** field, the message "Press F7 for table lookup" displays, or when you place the cursor in a date field such as **Birth date**, a message states that you can "Press F3 for today's date, F7 for calendar".

Navigation Shortcuts

You can use a variety of methods and shortcuts to navigate in *The Raiser's Edge*. For example, many main shell pages in the program contain links to other specific areas - the Configuration page contains links to Tables, Fields, Business Rules, and several others. To return to the main page from a link without using the Raiser's Edge bar, you can click the name (such as "Configuration") at the top of the page.

Ctrl Key Shortcuts

You can press the **CTRL** key at the same time as various letter keys on your keyboard to quickly access functions in *The Raiser's Edge*.

CTRL + **N** - New

CTRL + **O** - Open

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

CTRL + **S** - Save

CTRL + **W** - Save and new

CTRL + **L** - Save and close

CTRL + **T** - Annotate

CTRL + **Z** - Undo

CTRL + **X** - Cut

CTRL + **C** - Copy

CTRL + **V** - Paste

CTRL + **P** - Print

CTRL + **F** - Find

Function Keys

Throughout *The Raiser's Edge*, you can use function keys to help ease and speed your data entry. On some screens, when a function key is available the status bar at the bottom of the screen informs you which key to press. On other screens, the status bar is not visible, but you can still use the function keys to assist with data entry.

- **F1** - accesses help for the screen you are currently on
- **F2** - inserts the default value of a field (if one exists in a default set). The default entry replaces any existing entries (**SHIFT** + **F2** loads all values from a default set into a new record, but existing entries are not overwritten, only empty fields have entries placed in them)

- **F3** - inserts the current date in date fields
- **F5** - refreshes some grids and time or date stamps notepads
- **F7** - accesses lookups in tables
- **F7** - accesses calendars in date fields
- **F7** - accesses calculators in currency fields
- **F7** - zooms in note fields

Tabbing Through Screens

Instead of using your mouse, you can use the **Tab** key to navigate through all fields, buttons, etc. in a specific order on each screen. You can then select and mark items using other keys. For example, you can press the space bar on your keyboard to mark or unmark a checkbox, or use the up and down arrow keys to look through the available selections in a table.

Alt Key

Most menu items contain a "hot" key. Additionally, some buttons and other features contain hot keys. A hot key accesses a menu item when it is pressed at the same time as the **Alt** key. The hot key is immediately recognizable because it is underlined in the menu bar or on a button or tab.

Usually to access a menu item with a hot key, you press the **Alt** key and hold it down, then press the hot key letter for that particular menu item. To access a submenu, press **Alt** and the letter on the main menu, then without releasing the **Alt** key, press the key for the underlined letter in the submenu command.

However, sometimes a button or tab has the same hot key letter as a menu item. In these instances the procedure is a little different. To access the menu item, press **Alt**, then release it and press the letter. To access a button or tab, press **Alt** and while holding it down, press the underlined letter. For example, on a gift record **Alt** + **A** accesses the Matching Gift tab; **Alt**, **A** (**Alt** is released before pressing **A**) accesses the **Favorites** menu.
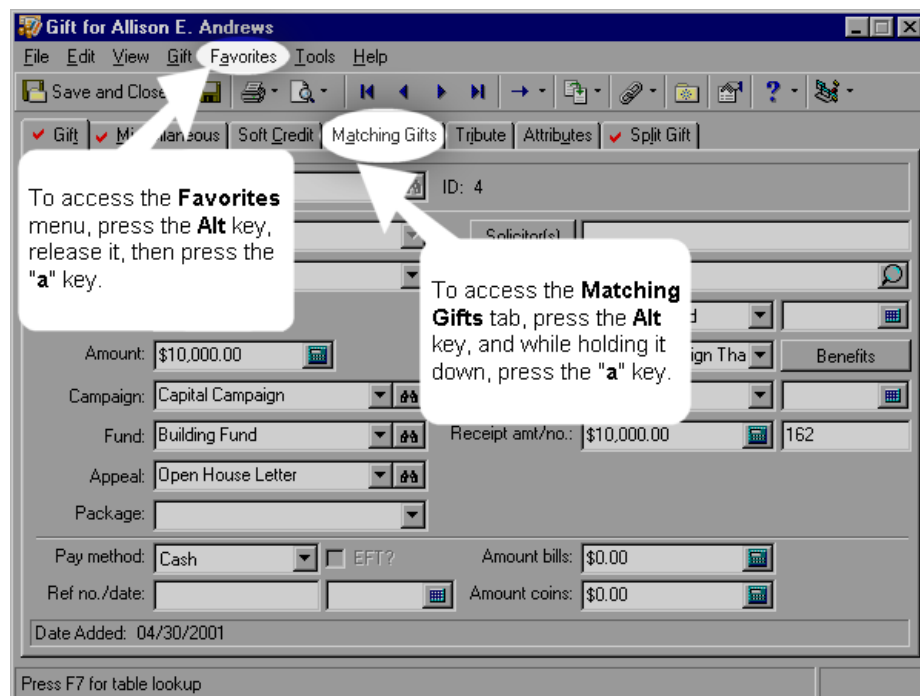
Shortcut Menus

Many fields (notes) and screens (especially grids) have shortcut menus. Most shortcut menus are accessed by right-clicking the mouse. **SHIFT** + **F10** accesses a shortcut menu in certain fields.

You can access commonly used commands throughout *The Raiser's Edge* by placing the cursor in a box or grid and right-clicking the mouse. A shortcut menu appears. The options available on the menu vary according to the area of the program from which you access it.
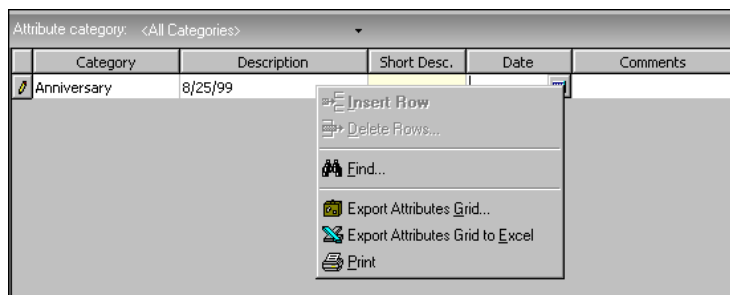
Menu Bar Commands

Numerous menu bar commands appear throughout the program. When you select a command from the menu bar, a submenu appears listing all options for the selected command. Some menu bar commands appear only in certain areas of *The Raiser's Edge*. Others appear only when you have certain optional modules. Common commands are discussed here. To learn more about commands in specific areas of the program, consult the documentation for those areas.

File Menu

New. You can add a specific record type. If you select this option from the shell menu bar, a submenu appears where you can select a record type. If you select this option from a record menu bar, you can add a new record of that type while the current record remains open. For example, if you select this command from the menu bar of a gift record, the New Gift screen appears, but the current gift record remains open.

Open. You can open a specific record type depending on your location in the program. For example, if you are in the **Campaigns** link of *Records*, the Open screen for campaigns appears.

Save. When you select this option from a record, any changes made to the record are saved. The record remains open for you to continue adding and editing information.

Save and New. When you select this option from a record, any changes are saved, the record is closed, and the New screen for that record type appears.

Save and Close. When you select this option from a record, any changes are saved, and the record is closed.

Delete (Record Type). When you select this option from a record, a confirmation message appears verifying that you want to delete the record. When you click **Yes** on the message, the record is permanently removed from the database.

Properties. When you select this option, the Properties screen for a record appears. Properties show such information as who created the record, when it was created, and when it was last changed.

Print Setup. When you select this option, the Print Setup screen appears so you can link *The Raiser's Edge* to your printer. See "Setting up a printer" on page 80.

Preview. When you select this option, a submenu appears listing items you can preview. The contents of the submenu depend upon the area of the program from which you select the command. You can preview items such as mailings or campaign profiles before you print them.

Note: Remember, not all menu options are available all the time from every area of the program.

Print. When you select this option from a record, a submenu appears. The contents of the submenu depend upon the area of the program from which you select the command. The first item in the submenu is the default print item.

Export. When you select this option from a record, a submenu appears listing items you can export to another program.

Send as Mail. When you select this option from a record, a submenu appears. The contents of the submenu depend upon the area of the program from which you select the command. An email window opens and *The Raiser's Edge* inserts the newly created file into an email message.

Recently Accessed Records. The actual name on the menu varies according to the area of the program from which you select the command. For example, from a constituent record it reads **Recently Accessed Constituents**. When you select the command, a submenu appears listing up to the last nine records you had open previous to the currently open record. You can open any of these records by clicking them.

Exit. When you select this option (or click ☒ in the title bar) on your Home page or any other main page, you exit the shell. All open records are closed, but the database remains open. Even if no records are open, the database remains open and you can log back into the program without entering your password again.

Exit and Sign Out. When you select this option from your Home page or any other main page, you exit the program and the database and all open records are closed. You must enter your password again to log back on to the program.

Edit Menu

Change Password. When selected from your Home page or any other main page, the Password screen appears. If you have security rights, you can change your password from anywhere in the program. See "Changing your password" on page 74.

Undo. When selected, the previous action is reversed. For example, you can undo a deletion and restore the deleted text.

Cut. When selected with text highlighted, the text is removed from the record and placed on the *Windows* clipboard where it can be pasted elsewhere.

Copy. When selected with text highlighted, the text is copied from the record and placed on the *Windows* clipboard where it can be pasted elsewhere.

Paste. When selected while the cursor is in field or grid, text cut or copied onto the *Windows* clipboard is placed into the selected field or grid.

Delete. You can use this command to delete highlighted text in a field.

Insert Row. When you select this option while the cursor is in an editable grid such as the one found on the Appeals tab of a constituent record, you can insert a row above the current row or a row you select. Use this command to enter information in order of importance.

Delete Rows. When you select this option while the cursor is in an editable grid, you can delete a row or rows you have highlighted.

Select Row. When you select this option while the cursor is in an editable grid, you can highlight the row in which the cursor is located.

Select All Rows. When you select this option while the cursor is in an editable grid, you can highlight all rows.

Export Grid. When you select this option while the cursor is in a grid, you can export the grid to another file location.

Export Grid to Excel. Enabled only if you have Microsoft *Excel*. When you select this option while the cursor is in a grid, you can export the grid to *Excel*. For more information, see "Exporting Grids to Excel" on page 67.

Find. This option is available while the cursor is in a variety of areas, including field lists, editable and non-editable grids, and selection boxes. When selected, the Find screen appears. You can use this screen to find a specific field or entry among a list with numerous entries. This saves time because you do not have to scroll through the list. For more information, see "Finding a field" on page 69.

View Menu

Columns. This option is enabled only when you are on a grid with changeable columns. When you select this option, the Columns screen appears so you can choose the columns you want to appear in the grid. For example, you can determine which columns appear on the grid for constituent relationships. You may want to view only name and date information for relationships in the grid, or you may want to include other columns such as **Profession** or **Income**. For more information, see "Selecting columns in a grid" on page 65.

Calendar. If you have *Event Management*, when you select this option from the shell menu you can view a **Calendar of All Events**.

Action Reminders. When you select this option from the shell menu, you can view a list of actions you are assigned.

Raiser's Edge bar. When you mark this option, the Raiser's Edge navigation bar is visible on the left. For easy navigation, we recommend you leave this option marked so the Raiser's Edge bar is always visible.

Legend. When you select this option, you can change how text displays on grids for certain record types. Legends most frequently identify the status or type of a record. For example, you can specify that pledges display in a different color and font style than other gifts in the grid on the Gifts tab of constituent records. For more information, see "Formatting a legend" on page 72.

Summaries. When you select this option from the shell menu, a submenu appears listing available summaries. When you select a summary, the Open screen for the record type the summary calculates appears. When you select a record from the Open screen, the summary automatically calculates for that record.

Zoom. When you select this option while the cursor is in a field with zoom capability, you can enlarge the visible area for entering text. For example, when you place the cursor in a **Notes** box, you can use zoom to enlarge the field so you can view more of the note as you enter or edit text.

Record Menu

The title of this menu changes according to the type of record from which it is accessed. For example, it becomes **Constituent** from a constituent record or **Campaign** from a campaign record.

First. When you select this option, the first record of that type in your database opens. For example, if you have an appeal record open and select **Appeal**, **First**, the appeal with the title listing first alphabetically in your database opens. If you select **Records**, **First** from the results grid of a query, the first record in the specified sort order of the query opens.

Previous. When you select this option, the record appearing immediately before the current record opens.

Next. When you select this option, the record appearing immediately after the currently open record opens.

Last. When you select this option, the record appearing last opens.

Load Defaults from. When you select this option, you can create a default set or select a previously created default set for a record. With default sets you can specify a default entry for nearly every field on a record. For example, if you frequently enter the same value in certain address fields, you can create an "Address" default set to greatly increase your data entry speed. Using record-specific menu options, you can load default sets into new records. For example, when you enter a new constituent record, you can select **Constituent**, **Load Defaults from** to access your saved default sets and select one to enter default values for the new constituent. For more information, see "Creating a default set" on page 78.

Go Menu

When you select this option from your Home page or any other shell page, a submenu appears listing the same links that appear on the Raiser's Edge bar. Click a selection to go directly to that area of the program. The menu also contains selections that depend upon the page from which you access it. For example, if you select **Go** from the main Reports page, you can select **Report Options** and another submenu appears listing the options that appear on the Reports page.

Favorites Menu

When you select a record as one of your favorites, a shortcut for it appears on your Home page. For example, if you have a constituent record you frequently access, you can select it as a favorite. You can then save time by opening it directly from your Home page instead of through the **Constituents** link of *Records*.

Add to Favorites. When you select this option while you have a record open, you add the record to your favorites. Once you select a record as a favorite, you can open it directly from your Home page.

Organize Favorites. When you select this option from the menu on your Home page or any main page, the Organize Favorites screen appears. This screen lists the records and functions you selected as favorites. You can specify the order in which they list on your Home page or you can remove records or functions from your list of favorites.

Add Page to Favorites. When you select this option from one of the main pages, you can add the page to your list of favorites.

Tools Menu

Visual Basic for Applications. This selection is available only if you have the optional module *RE:VBA*. When you select this option, you can customize **The Raiser's Edge** to perform such tasks as showing custom forms and performing quick mail merges.

Run Macro. This selection is also available only if you have the optional module *RE:VBA*. When you select this option, the Macros screen appears. You can create and edit macros to create shortcuts for functions you perform repeatedly in **The Raiser's Edge**.

Action Tracks. An action track is a series of actions you specify to occur in a certain order. When you select this menu option, a submenu appears. You can **Define Action Tracks**, **Assign Event Action Tracks** (if you have the optional module *Event Management*) or **Assign Constituent Action Tracks**.

Organize/Create Defaults. When you select this option, you can create a default set to save time during data entry. To learn more about default sets, see "Using Default Sets" on page 77.

User Options. When you select this option, the Options screen appears. If you have security rights, you can set a variety of options for displays, defaults, and data entry preferences. See the "User Options" chapter of this book for details on these options.

Unlock Optional Modules. When you select this option you can enter a code to activate optional modules you have purchased. For more information, see "Unlocking Optional Modules" on page 64.

Install Samples. Select this option to install sample exports, custom reports, custom views, Pivot Reports, and more. These samples can provide a starting point for you to create you own customized items. For more information, see "Samples" on page 50.

Help Menu

The Raiser's Edge Help Topics. When you select this option, you can view the contents of **The Raiser's Edge** help file.

User Guides. When you select this option, you can view and print the manuals for **The Raiser's Edge**.

Contacting Support. When you select this option, you can send email directly to Blackbaud Customer Support.

RE:VBA/API Help. If you have either of the optional modules *RE:VBA* or *RE:API*, use this option to get information about using the modules.

Read-Only Database Assistance. This option is visible only if you have the optional module *Read-Only Database Assistance*. Select this option to view the user guide for *Read-Only Database Assistance* in pdf format.

Blackbaud on the Web. When you select this option, a submenu appears. When you select **Blackbaud Home Page**, your Internet browser automatically accesses the Blackbaud Web site where you can view updates and other useful information. When you select **Online Support**, you can directly access Blackbaud Technical Support on the Web.

About The Raiser's Edge. When you select this option, you can learn helpful information about the program, such as the version number, serial number, and other registration information.

Toolbar Buttons

Note: Click the down arrow beside a toolbar button to view additional functions for that button.

The toolbar contains buttons representing commands common throughout *The Raiser's Edge*. When you click a button, you can easily perform a function, such as saving, without using the menu bar. Some buttons contain a down arrow; when you click this down arrow, additional options become available. For example, when you click the down arrow beside the **Save and Close** button, the **Save and New** button becomes visible.

The following standard buttons are found on many toolbars throughout the program. Many of these buttons are visible only if you have certain optional modules. Other buttons appear only when a record is open. For a list of each toolbar button in a specific area of the program, see the "Navigating" section in that particular chapter.
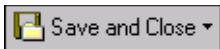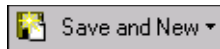
Save and Close the current record	Save and close the current record and open a new one
Save the current record and keep it open	Delete data
Preview data prior to printing	Print data
Export data	Email data
Find data	Add to favorites
Access Help Contents	Annotate
Run query	Duplicate Search
Go to the first record	Go to the previous record
Go to the next record	Go to the last record

Go to a selected record in a grid

Show Relationship tree

Design a batch

Validate a batch

Drop a membership

Rejoin a membership

Downgrade a membership

Renew a membership

Properties

Link gifts

Apply to gift

Honor/Memorial

Authorize credit card

Calendar of events

Installment schedule

Run Macro (visible if you have the *RE:VBA* optional module)

Crystal Reports, Refresh

Crystal Reports, Export

Write a letter to create a *Word* merge

AddressAccelerator (available if you have the AddressAccelerator service)

Standard Buttons

Note: If you have the *RE:VBA* optional module, you can use macros to integrate code from custom programs you create with the program code from **The Raiser's Edge**. For more information about the *RE:VBA* optional module, contact our Sales department at 1-800-443-9441.

Many buttons throughout *The Raiser's Edge* appear on screens rather than on the toolbar. These buttons function in the same manner regardless of where they are located. When you click a button, the program performs the described function. Some buttons appear only in certain areas of the program. For a listing of buttons in a specific area of the program, see the "Navigating" section of the chapter for that particular area.

🔍	Search for data to enter in the field
▼	Access the drop-down list associated with that field
...	Browse the system to select the correct path and file name
🖩	Open a calculator for easy entry of amounts in currency fields
📅	Open a calendar to help locate the correct entry for date fields
🔍	Zoom in on a message or text field

Name — Add name information	**Address** — Add address information
Add — Add information	**Run** — Execute the current task
New — Create new record or entry	**Open** — Open existing record or entry
< Back — Move back one screen or step	**Next >** — Move forward one screen or step
Find... — Search for a particular item or record in the database	**More Info...** — Display more information
Cancel — Cancel an operation	**Insert** — Insert a table entry
Copy From... — Copy information from another record	**OK** — Complete a command, leave a screen, or close a message
Preview — Preview information before printing	**Print...** — Print current information

Down	**Up**
Move an item down one line in a list	Move an item up one line in a list
Delete...	**Edit**
Delete highlighted record or table entry	Edit a table entry
Select->	**<-Remove**
Select fields to include in a function	Remove fields from a function
Solicitor(s)	**Insert Subtype**
View solicitor hierarchy	Insert gift subtype
Save	**Include...**
Save record or function parameters	Include fields in function
Export Now	**Import Now**
Begin export	Begin import
Details...	**Finish**
View more information	Complete an action or procedure

Miscellaneous Features

The Raiser's Edge contains several standard features you will see throughout the program. It is important that you be able to recognize and use these features.

Selection Boxes

Selection boxes are found throughout *The Raiser's Edge*. They are most commonly used to select fields or records to include in a group. For example, in a selection box from an event record, you can select a group of fields to update on a participant record.

Use these list boxes to select which participant fields you wish to change.

General 1
  Guest Of
  Invitation Date
  Participation
  Registration
  Registration Date
  Response
  Response Date
  Send Event Reminders
  Solicitor
  Sponsor
General 2
  Arrival Date
  Arrival Name
  Arrival Number

Attended
Invitation
Is Coordinator
Status
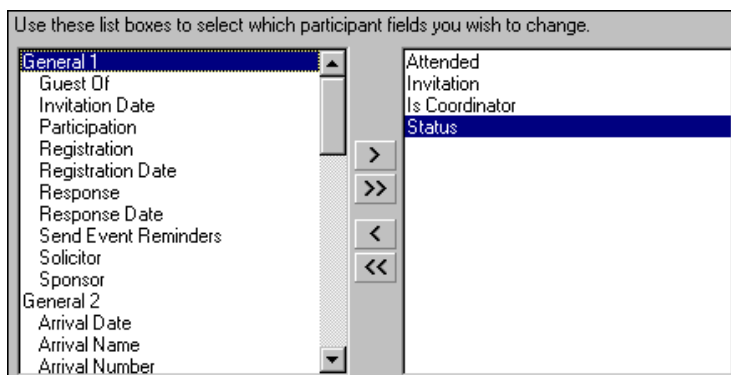
To move an item from one box to another, select the item and click the single arrow pointing to the appropriate box, or just double-click the item. To move all the items from one box to another, click the double arrow pointing to the box into which you want to move the items.

Tree Views

Tree views are hierarchical selection lists used extensively in *The Raiser's Edge*. They differ from standard lists in that some (or all) of the items in a tree view contain branches represented by dotted lines. Tree views are usually found on the left side of the screen. When you select an item or branch in a tree view, the options for that item appear on the right. For example, when you select **Individuals** in the tree view on the Records tab of User Options, all options for individual constituents appear on the right.
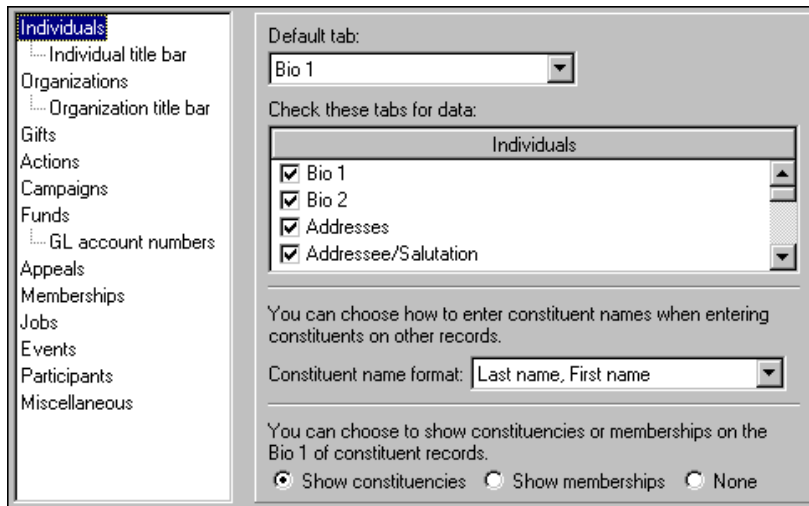
Some tree views automatically display all branches (as with the example above); for others, you must click a plus sign to view its branches.

The Raiser's Edge Home Page

Note: To learn more about selecting the information you want on your Home page in User Options, see "Home Options" on page 88.

You can personalize *The Raiser's Edge 7* by creating shortcuts for records and functions you access directly from the Home page, instead of through *Records*, *Mail*, *Query*, *Export*, *Dashboard*, and other areas of the program. For example, you want to closely monitor your most recent gifts by processing the Recent Gifts List dashboard panel. By using **Customize Home Page** on the Home page action bar, you can set up to view this panel continuously on your Home page in just a few short steps. You can also send an email to a constituent, open specific records, queries, and exports by making them your Favorites, and process tasks directly from the Home page. Beyond adding *Raiser's Edge* functions, you can also add external documents to the Home page, such as *Crystal Reports* or Microsoft *Word* documents.

Consider the Home page your most frequently accessed page in *The Raiser's Edge 7*. Here, you view your most commonly referred to information and you perform your most commonly used functions. One central location for this information can save you data entry and processing time.
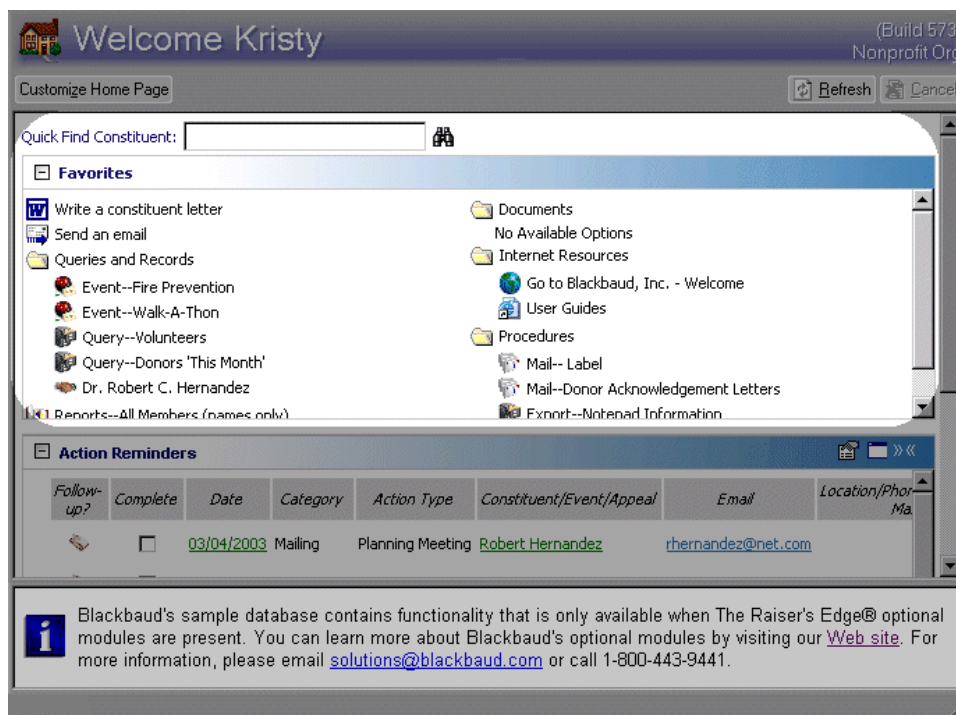
To access the Home page, click **Home** on the Raiser's Edge bar. The Home page welcomes you to *The Raiser's Edge* by using your login name in the title bar. The title bar also includes your organization's name and the *Raiser's Edge* build number you are running on your workstation.
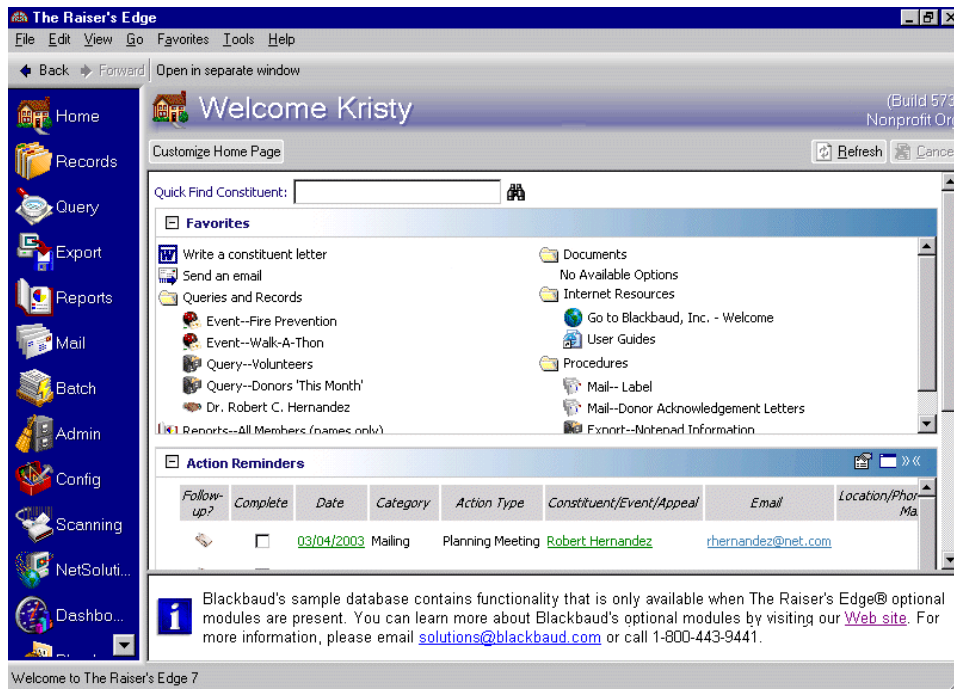
To refresh and cancel tasks, use the **Refresh** and **Cancel** buttons on the Home page action bar. It is important to refresh your Home page selections so any new data is included in your results. Cancel a task if you need stop it from completing a process.

Favorites

You can use Favorites to open specific records directly from your Home page. You can also process your favorite, or most common, functions from here. For example, you can process and display the Giving History Report, or any other report, directly from the Home page. On the Home page, you can also add direct links to other functions, such as a query or a mail task. You can select to have these functions automatically execute when you click the link.


To create Favorite links on the Home page, highlight the task you need and select **Favorites**, **Add to Favorites** from the shell menu bar. For example, to add a mail task directly to the Home page, click **Mail** on the Raiser's Edge bar. When the Mail page appears, highlight the task you need. From the shell menu bar, select **Favorites**, **Add to Favorites**. When you return to the Home page, you have a direct link to the mail task in Favorites.

Note: If you save a function in a folder on the Home page, the function does not automatically execute as it does when you click a direct link on the Home page. For example, if you save a query in the Queries and Records folder, you must navigate inside the folder to display the query results. If you save the function directly to Favorites, a link is created on the Home page for you to click and execute the task. For more information about saving functions in folders, see "Accessing a query from the Home page" on page 41 and "Home Options" on page 88.

Favorites on the Home page can also serve as a Blackbaud and ***Raiser's Edge*** information resource. For example, you can create a link to the Blackbaud Web site or to Knowledgebase. You can select the resources you view on the Home page in User Options. To access User Options, click **Customize Home Page** on the Home page action bar. For more information about Home page User Options, see "Home Options" on page 88.

Additional Favorite selections include adding links to send a letter or an email to constituents. From the **Favorites** shell menu, you can also include shortcuts to each Raiser's Edge page on the Home page. For example, select **Favorites**, **Add Page to Favorites** from the Export page to add a shortcut to *Export*.
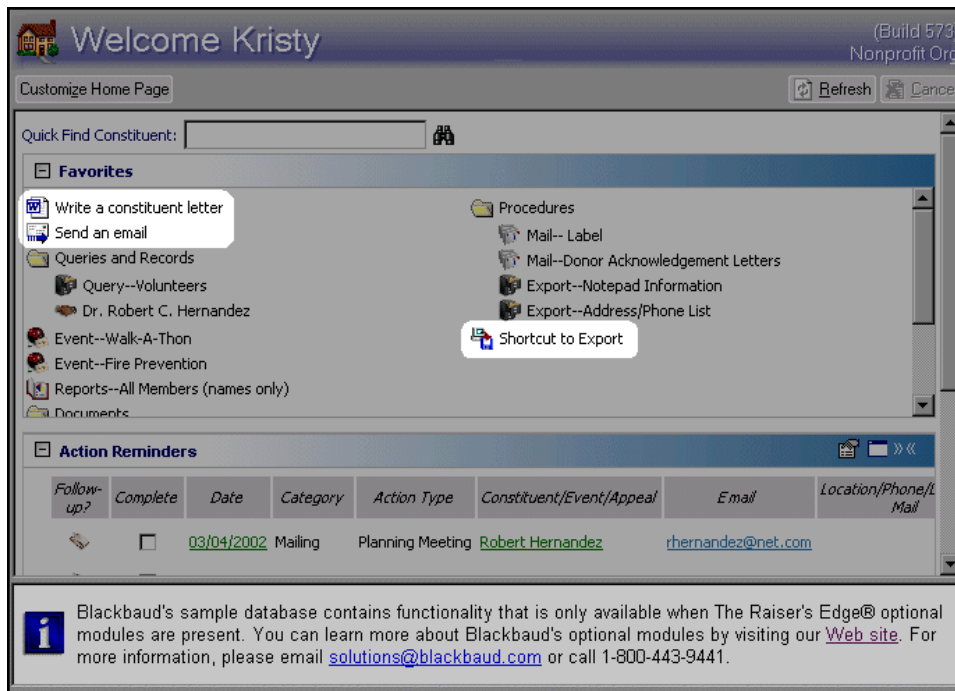
For more information about sending a letter or an email to a constituent, see "Sending an email to a constituent" on page 43.

In addition to saving *Raiser's Edge* functions and tasks on the Home page, you can also add links to external documents, such as a Microsoft *Excel* document. For more information about adding external documents to the Home page, see "Adding an external document to the Home page" on page 45.
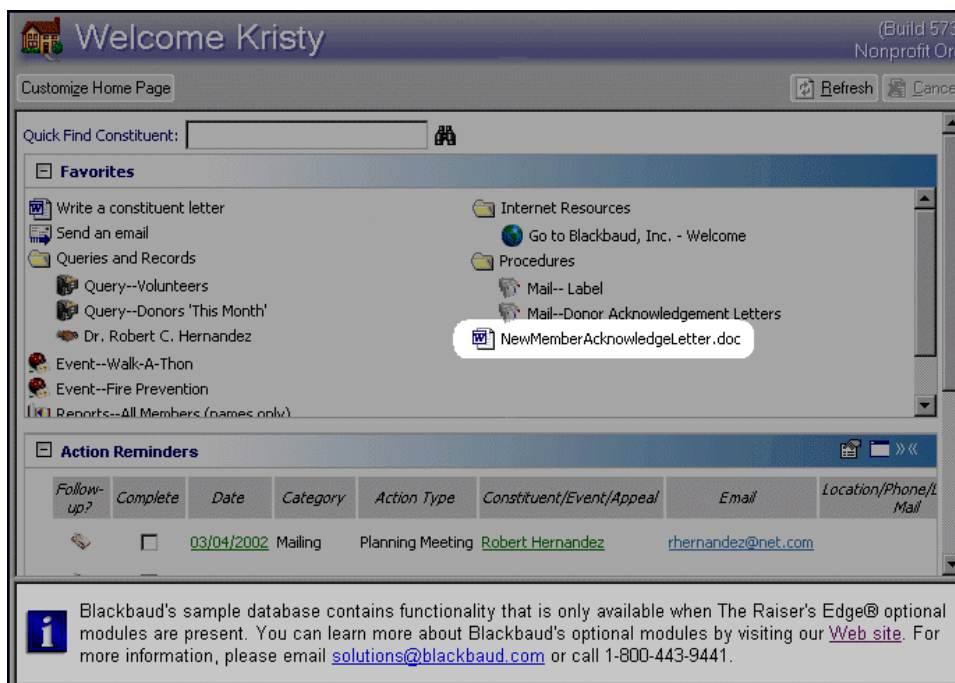
Dashboard Panels

Warning: The Dashboard panels you choose to display on your Home page are separate from the panels you choose to display on the Dashboard page. For example, if you display the Donor Giving Analysis on the Dashboard page, it does not automatically appear on your Home page. To display the panel on your Home page, you must create it from the Home tab of the Options screen of User Options. For more information about Dashboard, see the *Dashboard Guide*.

Dashboard panels provide a quick overview of information in your database, in an organized presentation. You can create numerous panels of summarized information to track the progress or performance of your organization's campaigns, funds, appeals, gift giving, and other important information you store in *The Raiser's Edge*. Because Dashboard panels are a real-time snapshot of your organization's progress and is something you may refer to often, you should display your most frequently used panels on the Home page. For example, to view your action reminders on a daily basis, display the Action Reminders Dashboard panel. Select the Action Reminders panel on the Home tab in User Options. To access User Options, click **Customize Home Page** on the Home page action bar. For more information about Home page User Options, see "Home Options" on page 88.

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

If you display the Action Reminders dashboard on the Home page, you have access to two additional columns that are not in *Dashboard*. Click the icon in the **Follow-Up?** column to quickly add a follow-up action record. Once an action is complete, you can easily track this by marking the checkbox next to the corresponding action in the **Complete** column.

It is important to remember that if you click **Cancel** on the Home page action bar before a Dashboard panel has completed the Loading process, you cannot revert the panel back to the previous results. Any panel with "Loading" displayed in the Dashboard panel when you click **Cancel** returns back to the original panel results.

Everyday Tasks on the Home Page

You can personalize *The Raiser's Edge 7* by creating shortcuts for records and functions you access directly from the Home page, instead of through *Records*, *Mail*, *Query*, *Export*, *Dashboard*, and other areas of the program. The Home page should be your most frequently accessed page in *The Raiser's Edge 7*. Along with adding *Raiser's Edge* functions to your Favorites, you can also add external documents to the Home page, such as *Crystal Reports* or Microsoft *Word* documents and send an email to constituents. Here, you view your most commonly referred to information and perform your most commonly used functions in *The Raiser's Edge 7*. Having one central location for this information can save you data entry and processing time.
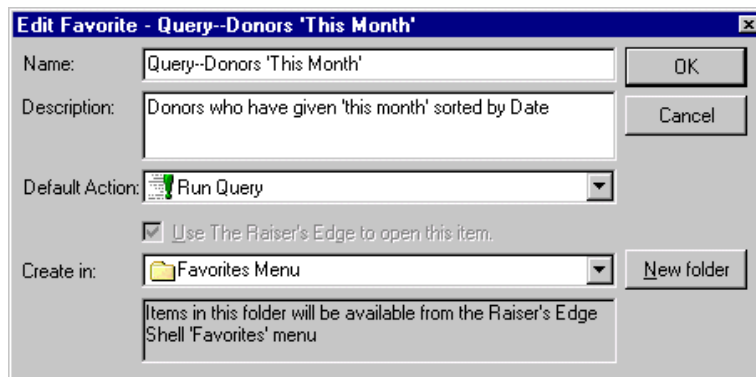
▶ **Accessing a query from the Home page**

Before you can access a query from the Home page, you must add the query to your list of Favorites.

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

2. Highlight the query you want to add to Favorites.
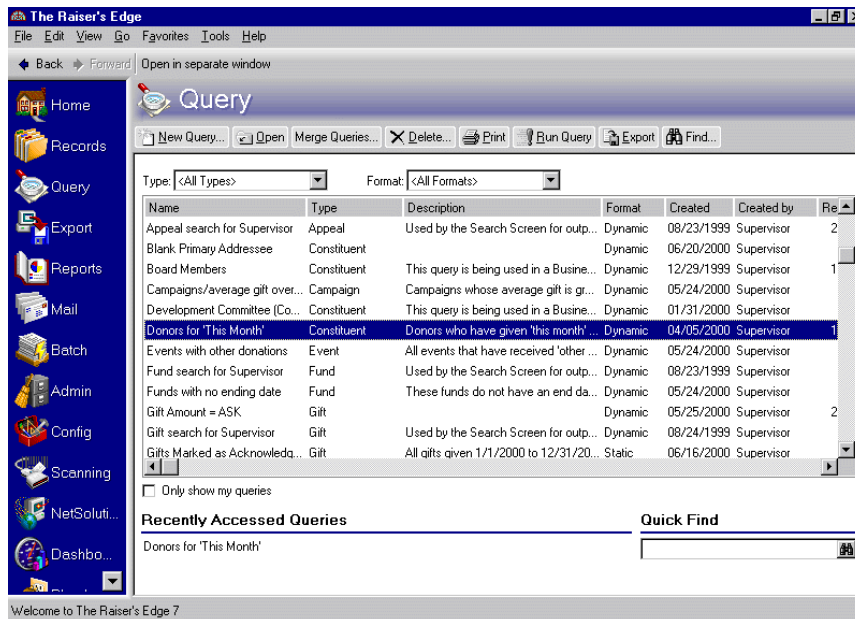
3. From the Raiser's Edge shell menu bar, select **Favorites**, **Add to Favorites**. The New Favorite screen appears.

Note: The **Use The Raiser's Edge to open this item** checkbox only enables if you are adding an external document to the Home page.

4. Leave the default information in the **Name** and **Description** fields.

5. In the **Default Action** field, select if you want to run, open, export, or send the query as email from the Home page.

6. In the **Create in** field, click the down arrow and select the "Queries and Records" folder.
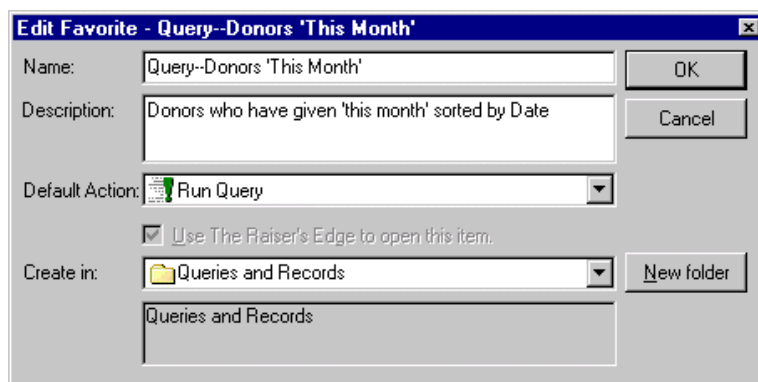
7. To close the New Favorite screen, click **OK**.

*Note:* You can create a link to a query (as well as other *Raiser's Edge* functions) directly on the Home page. For more information about adding Favorite links directly on the Home page, see "Favorites" on page 38.

8. On the Raiser's Edge bar, click **Home**. The Home page appears.

9. Click the Queries and Records folder in the **Favorites** frame. The list of contents for the folder appears.
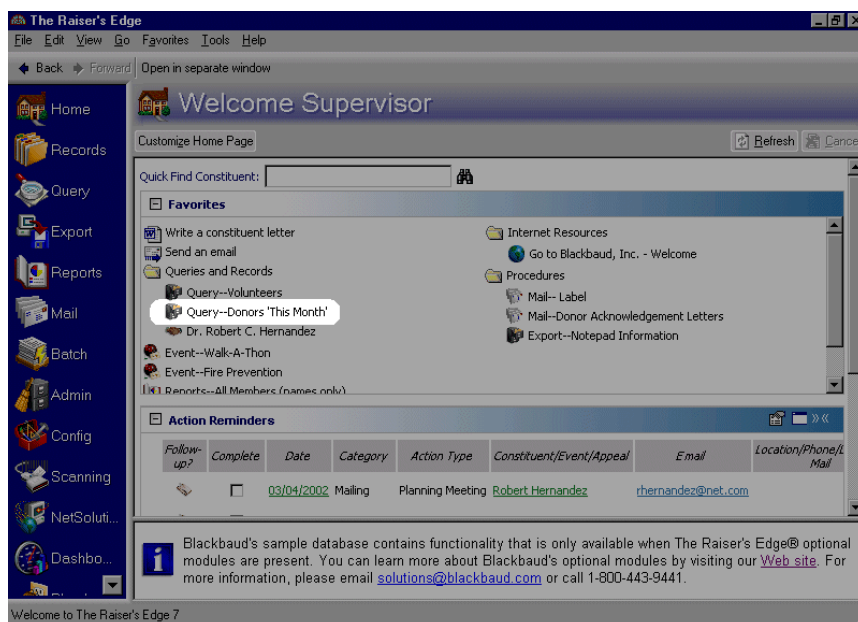
Note: You can also execute a function (such as Run Query or Open Query) by right-clicking the link for the task on the Home page. When you right-click the link, a menu appears. From the menu, select the function you want from the list that appears.

10. To execute the function (such as Run Query or Open Query) you selected in the **Default Action** field on the Edit Favorite screen, click the query title. The query function automatically processes.
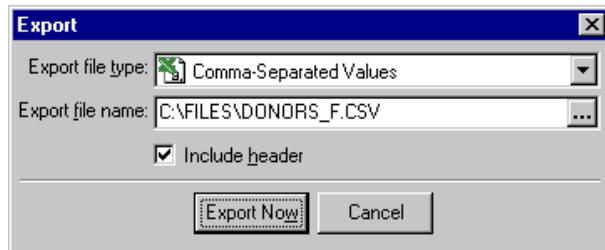

11. To export the query results, click **Export Now**.

For your convenience, the query remains on the Home page until you remove it.

▸ **Sending an email to a constituent**

You can save time and effort when sending an individual letter or email to a constituent by adding links to your Home page. When you add the link for writing a letter or sending an email to Favorites, much of the process for doing either task becomes automated.

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

2. On the action bar, click **Customize Home Page**. The Options screen appears.
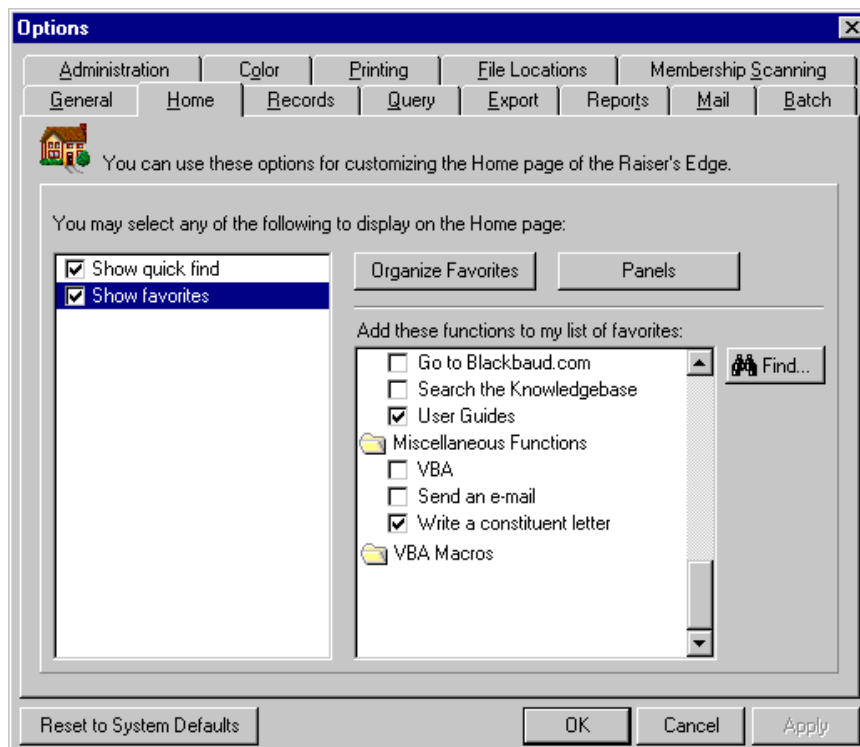
Note: Mark the **Write a constituent letter** checkbox to include a link on the Home page for writing an individual letter to a constituent.

3. In the **Add these functions to my list of favorites** box, mark the **Send an email** checkbox in the Miscellaneous Functions folder.

4. To close User Options, click **OK**. Your return to the Home page. For more information about Home page User Options, see "Home Options" on page 88.
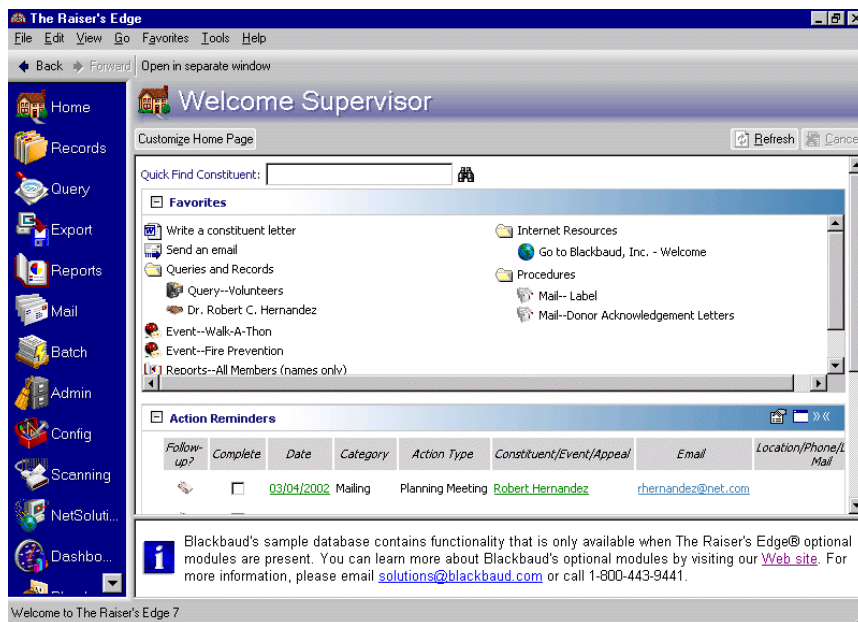
5. In the **Favorites** frame, click the **Send an email** link. The Open screen appears so you can search for the constituent to whom you want to send an email.
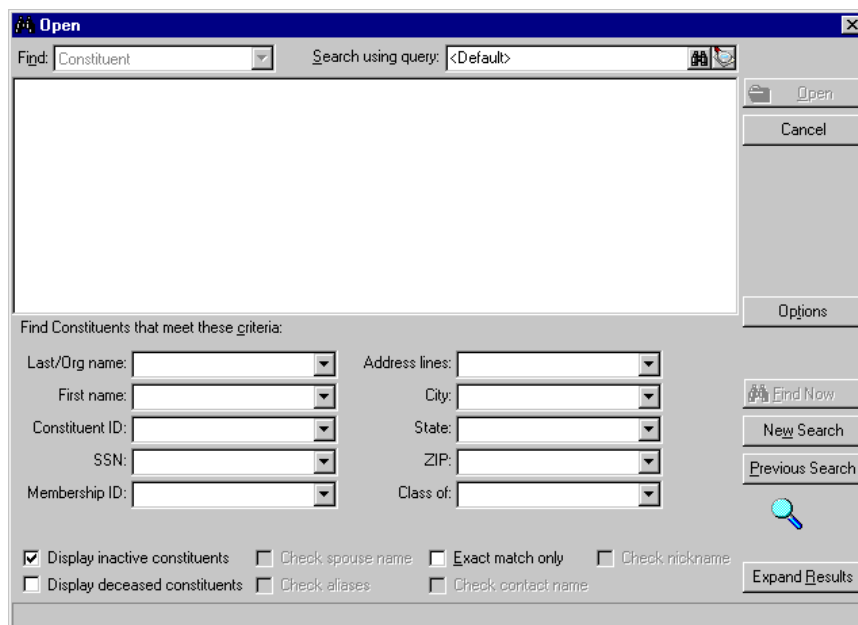
Note: The steps to writing a constituent letter from the Home page are the same as sending an email. When you click **Open** on the Open screen, *Word* opens. The date, addressee, address block, and salutation default automatically in the document (as long as this data exists on the constituent record). From this *Word* screen, you can include the text you want for your constituent letter.

6. Search for the constituent you want and click **Open**. Your email screen appears with your constituent's email address automatically appearing in the **To** field. For more information about searching for constituents, see "Finding and opening a record" on page 54.
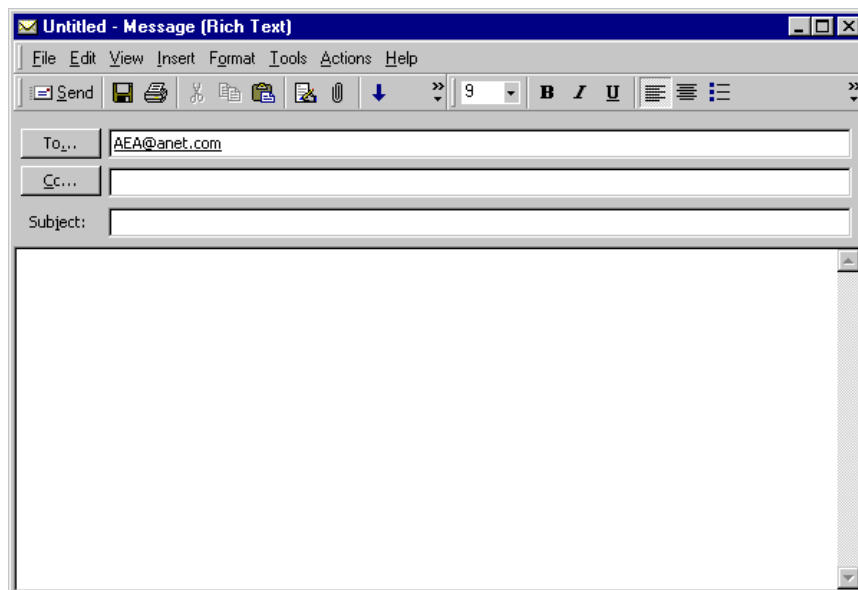
If an email address does not default in your **To** field, the constituent does not have an email address on the Bio 1 tab of the constituent record.

Note: If you mark the **Automatically create an action record for that constituent** checkbox business rule in *Configuration*, an action record automatically adds for the constituent when you send an email. For more information about **Business Rules**, see the Configuration chapter of the *Configuration & Security Guide*. For more information about action records, see the Actions chapter of the *Constituent Data Entry Guide*.

7. Write the email message you want to send to your constituent and send the email. Once the email is sent, you return to the Home page.

▶ **Adding an external document to the Home page**

Frequently used external documents, such as a *Crystal Report* or Microsoft *Word* document, can be added to your Favorites for quick access.

1. Save the document you want to access from the Home page to the Desktop on your computer (or any other place on your computer that allows you to click and drag a file).

2. On the Raiser's Edge bar, click **Home**. The Home page appears.

3. Using your mouse, click and drag the external document to the Home page.
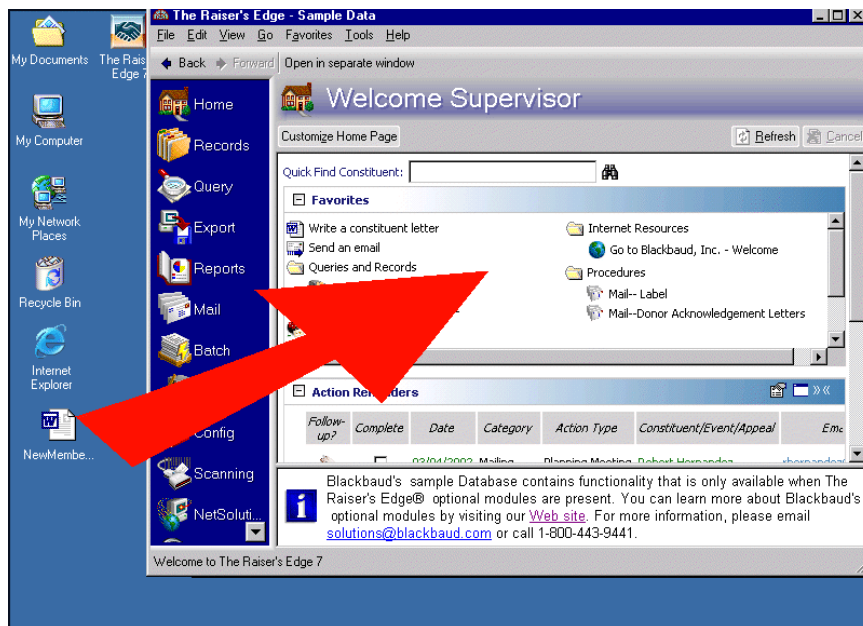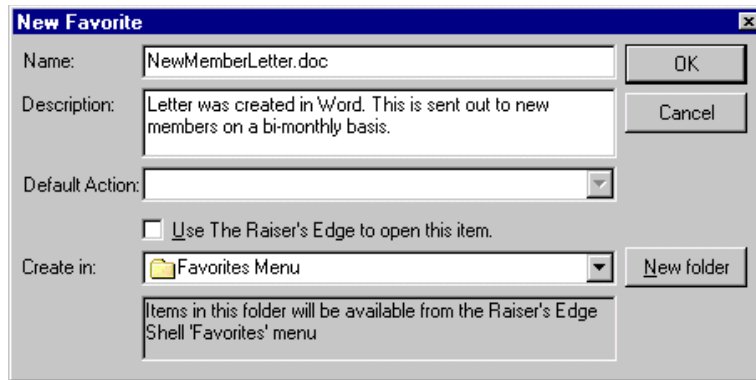
4. When you release your mouse over the Home page, a New Favorite screen appears so you can add the external document.
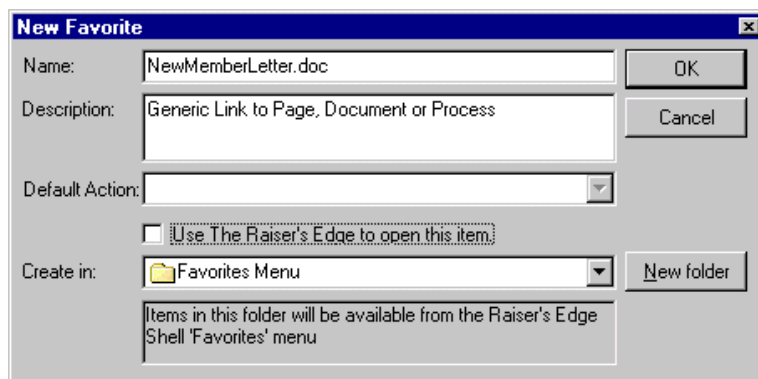
5. Enter the **Name** and **Description** you want for the new Favorite.

6. When adding external documents to the Home page, the **Default Action** field is disabled.

7. If you want to be able to open the document in an editable format, do not mark the **Use The Raiser's Edge to open this item** checkbox. If you mark this checkbox, the document opens within the Raiser's Edge shell. To open the document separately, leave the checkbox unmarked.

8. In the **Create in** field, leave the default "Favorites Menu". This way, a link to the external document is created directly on the Home page. If you prefer to save it to a folder on the Home page, click the down arrow to select the folder you want.

9. To save your external document on the Home page, click **OK**.
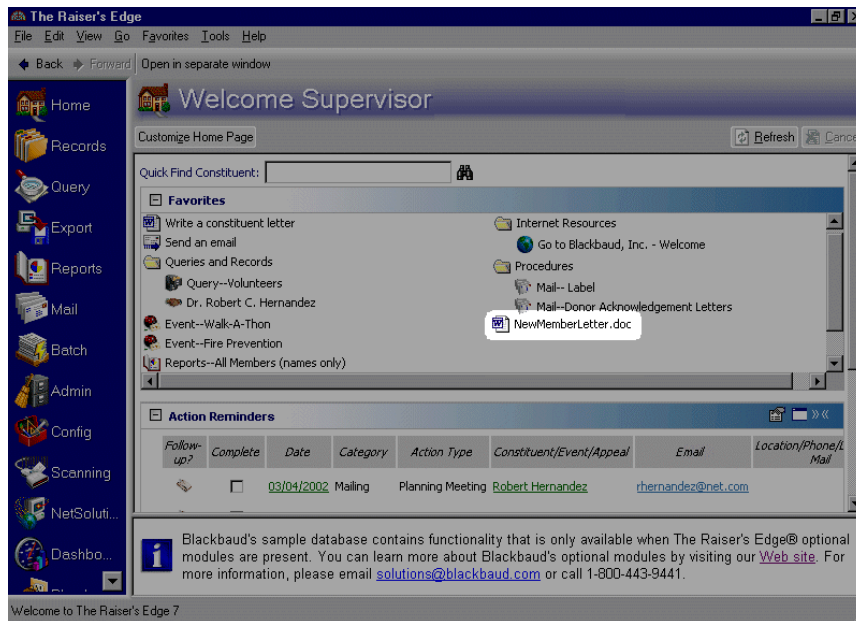
10. To open your document, click the link on the Home page. The document opens in *Word*.
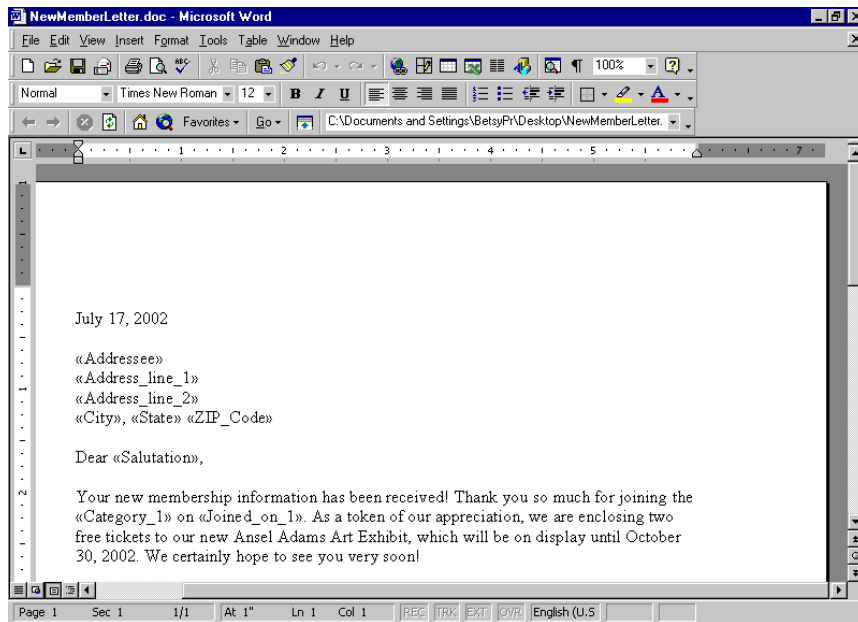
11. To return to the Home page, select **File**, **Exit** from the Microsoft menu bar.

▶ **Accessing The Raiser's Edge documentation on the Web site**

In User Options, you can select to add a link to the User Guides page on the Blackbaud Web site. Once you do this, you can quickly access ***The Raiser's Edge*** user guides from the Home page.

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

2. On the action bar, click **Customize Home Page**. The Options screen appears.
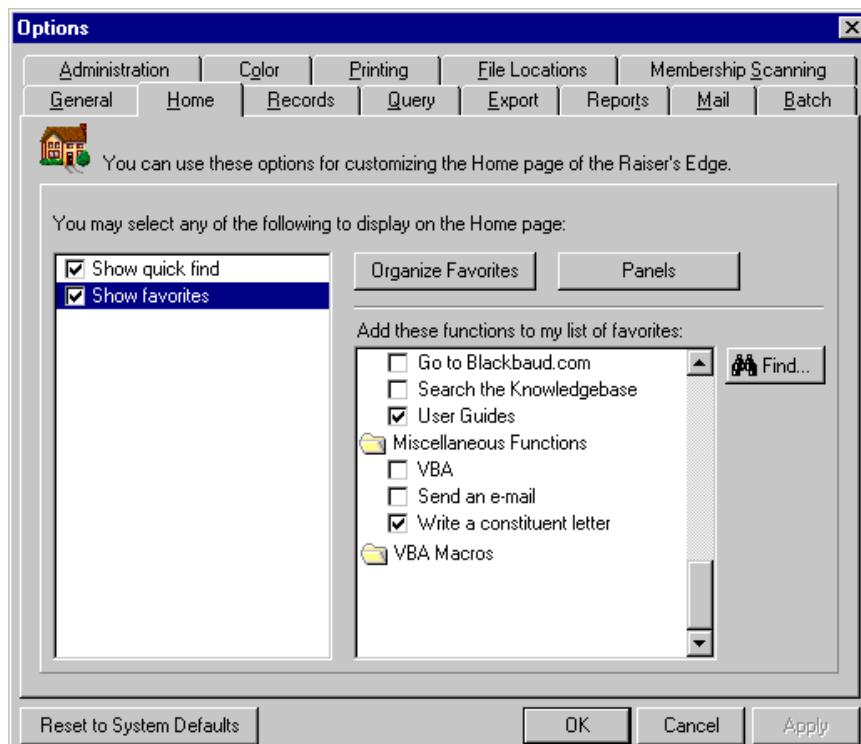
3. In the **Add these functions to my list of favorites** box, mark the **User Guides** checkbox in the Internet Resources folder.

4. To close User Options, click **OK**. Your return to the Home page. For more information about Home page User Options, see "Home Options" on page 88.

5. In the **Favorites** frame, click the Internet Resources folder. The list of contents for the folder appears.
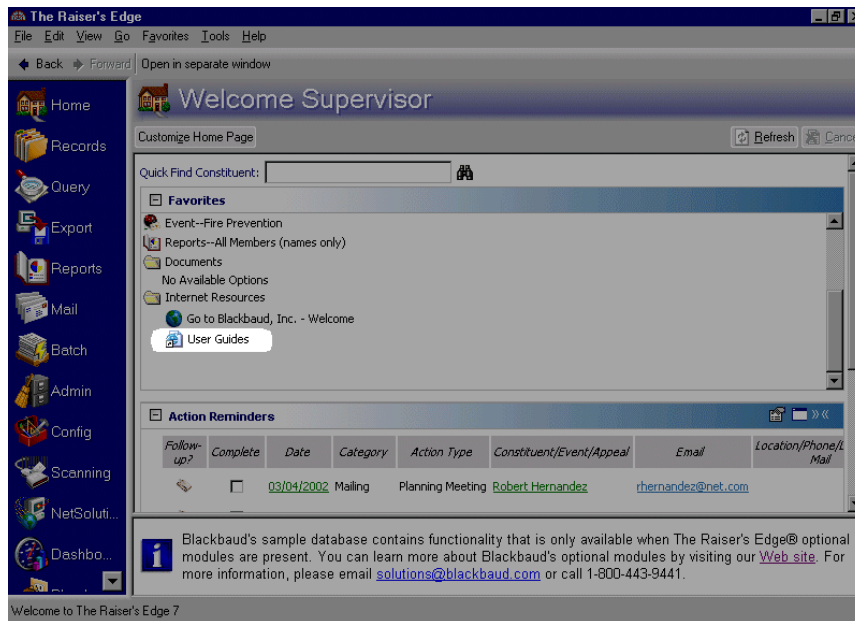
> **Warning**: Visit our Web site at www.blackbaud.com for the latest documentation and information. You can also review documentation within the program by selecting **Help**, **User Guides** from *The Raiser's Edge* shell menu.

6. Click **User Guides**. The User Guides page on the Blackbaud Web site appears.
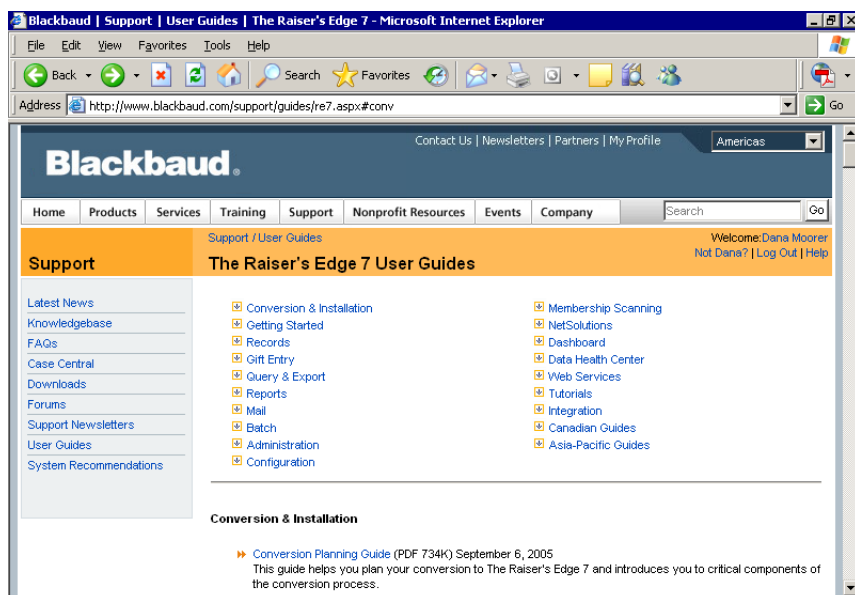
7. To return to the Home page, select **File**, **Close** from the menu bar.

Samples

> **Warning**: Do not confuse these samples with the sample database. The sample database includes numerous records you can use to experiment with as you familiarize yourself with the program. The samples discussed in this section are items such as queries and reports you can install and use with your live database.

Samples are actual working queries, exports, reports, custom views, business rules, and letters you can use with your live database. Some of these items will save the time it takes to create them yourself. Others may serve as starting points to get the specific results you are seeking. For example, available samples include an export with criteria set to export donors with a total amount given this year, and a sample query with criteria set to filter gifts given to a specified appeal in a specified date range.

When upgrading from a previous *Raiser's Edge 7* version, samples of new functions are automatically installed to your database during the upgrade. To install samples for functions that existed prior to this version, you must use the Sample Installer. You can also use the Sample Installer to view all your currently installed samples. For a new installation of *The Raiser's Edge*, all samples are automatically installed.

▸ **Installing samples**

1. From the shell menu bar, select **Tools**, **Install Samples**. The Samples page appears.

2. You can display all the available samples, or select an entry in the **Category** field and view only the samples available for that category. The available categories are, Business Rules, Custom Views, Exports, Letters, Queries, and Reports.
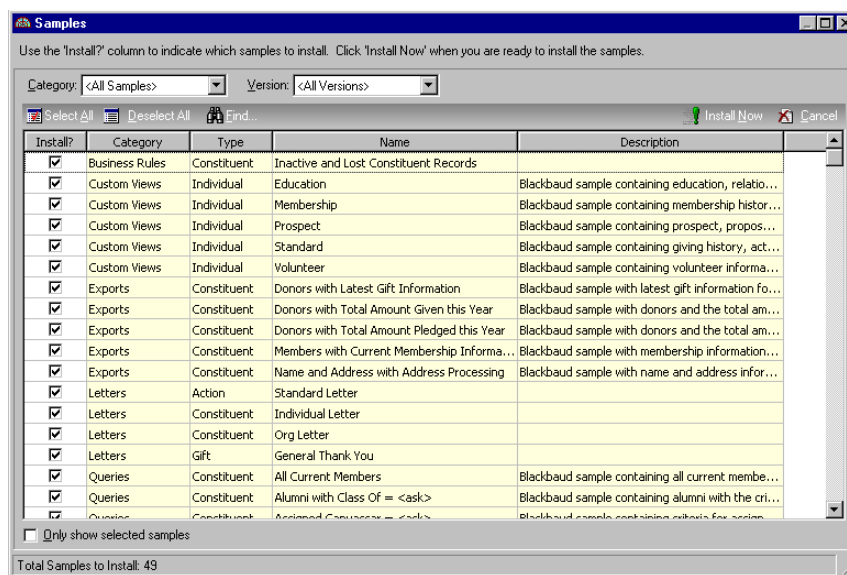
3. You can select an entry in the **Version** field to filter samples by version. The version number is the main version the sample is associated with (for example, *The Raiser's Edge 7.5*). Whenever you upgrade the program, you can filter based on the current version number so you see only those samples that are new in that version.

4. Select the samples you want to install. All samples for the latest version of *The Raiser's Edge* default to marked. If you want to select all the samples in the grid, click **Select All** on the action bar.

    If you select samples in a **Category**, and then change the view to another category so the selected samples are no longer visible in the grid, the samples remain selected.

5. To view only those samples you selected to install, mark the **Only show selected samples** checkbox near the bottom of the page.

6. To install the samples you selected, click **Install Now** on the action bar. A message appears.
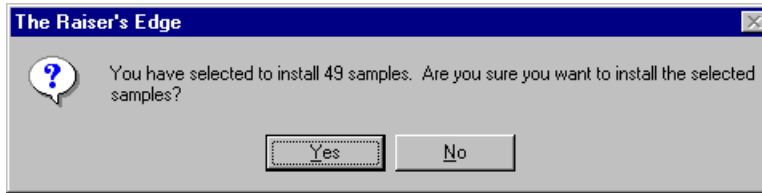
7. Click **Yes** to install the samples. A processing screen appears followed by the Install Samples screen.

8. The Install Samples screen informs you whether the installation was successful. Items that are not installed successfully are exceptions. For example, if you select an item that is already installed, a message asks if you want to overwrite the existing item. If you select not to do this, an exception is generated and the item is not installed again.

   Click **Close** to exit the Install Samples screen and return to the Samples page.

9. To exit the Samples page, click "X" in the upper right corner. You can now access the samples you installed. For example, if you installed a sample query, when you click **Query** on the Raiser's Edge bar, the sample now lists on the Query page.

Common Procedures

The following procedures are performed throughout *The Raiser's Edge*. These standard procedures include finding, saving, and deleting records; sorting information in boxes and grids; setting up printers; adding addresses to records; entering dates and currency amounts; and creating default sets. These procedures help you manage your data easily and efficiently in many areas of the program.

Using Tables

Tables are fields that contain predefined entries. They are widely used throughout *The Raiser's Edge*. You can select from these entries to make your data entry quick and consistent. Instead of typing an entry manually, you can select the entry with a single mouse click.

Warning: If you add entries to tables by typing into a field, be sure an entry that suits your needs does not already exist. To maximize the data entry effectiveness of your tables and keep the number of entries manageable, you must ensure you do not have different entries that actually mean the same thing, such as separate address entries for "Work" and "Business".

In some cases, such as the **State** table, the entries are defined by the program; however, for most tables, if you have security rights, you can define entries. Tables and table entries are discussed in detail in the "Configuration" chapter of the *Configuration and Security Guide*. You can access table entries in four ways.

	A down arrow next to a field indicates a table lookup is available. Click the arrow to access a drop-down list of entries for the field.
Arrow Keys	Place the cursor in a field and then press the down arrow key on your keyboard to scroll through the available entries.
Typing	Typing an entry into a field is another way to access an entry. If the entry you type does not exist in the table, the system displays a message asking if you wish to add the new table entry. Click **Yes** to add the new entry.
F7	Pressing **F7** also accesses tables. The message "Press F7 for Table Lookup" appears on the status bar when a table is available.

▶ **Editing table entries**

If you have security rights, you can add, edit, and delete entries for tables.

Tip: To make your data entry easier, mark the **Automatically Complete Table Entry** checkbox on the General tab of User Options. This lets *The Raiser's Edge* automatically complete the remaining part of the table entry. For example, typing "S" automatically displays the first table entry beginning with the letter S.

1. Click your mouse in a field with a table and press **F7** on your keyboard. A screen appears listing all the existing entries for the table.
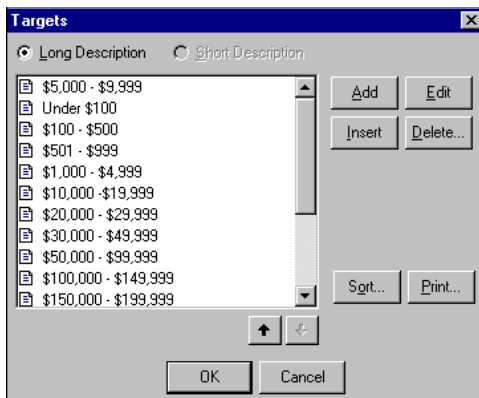
Note: If you have security rights, you can also add, edit, and delete table entries in *Configuration*.

2. On this screen you can **Add** new entries, **Edit** existing entries, **Insert** a new entry at a specified point in the list, or **Delete** entries. You can **Sort** the order in which the entries appear; the order you set determines how the entries display in the drop-down list. You can also **Print** a list of all entries in the table for your records.

3. Click **OK** to automatically save any changes and return to the field.

Finding and Opening Records

Note: If you have a network version of *The Raiser's Edge* and try to open a record another user already has open, a warning message appears. The message informs you the record is in use and you will not be able to save any changes you make to it. You can still open the record while it is in use, but all **Save** and **Delete** functions are disabled.

If you know all or part of the name of the record you want to open, you can use the **Quick Find** feature on a specific *Records* page. If you need a more detailed search, you can use the Open screen. The Open screen is common among all record types. You can use it to search for a particular record or group of records. You can define a query to filter the results of your search. For example, you can limit a search for constituent records to include only records with addresses in certain cities or states, or you could base a search for funds on certain date ranges.

The Open screen contains a number of buttons along the right side. These buttons are common to most Open screens. When you click **Open**, a selected record in the search results grid opens.

When you click **Cancel**, the Open screen closes and you return to the main page for the record type.

Note: The **Add New** button is not available on all Open screens.

When you click **Add New**, the New screen for the record type appears so you can create a new record.

When you click **Options**, the Miscellaneous Search Options screen appears. For example, the Miscellaneous Search Options screen for constituents is shown below.
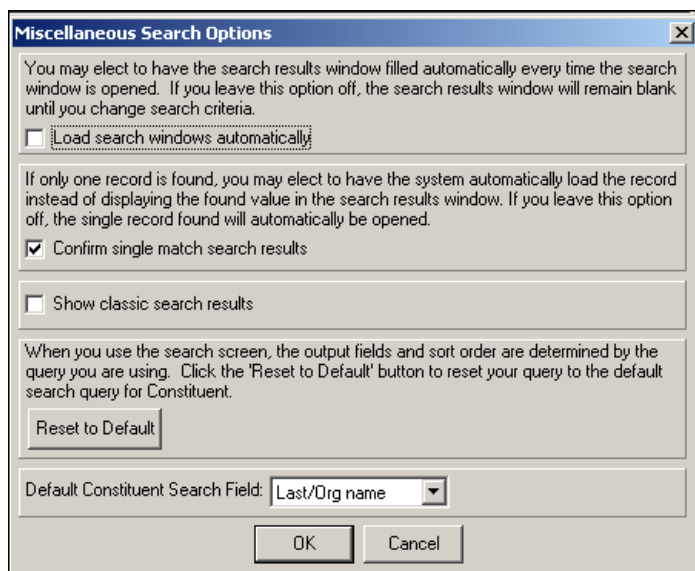
- When you mark the **Load search windows automatically** checkbox, when you access the Open screen, the results of the default query you enter in the **Search using query** field list automatically in the grid.

- When you unmark the **Confirm single match search results** checkbox, if only one record matches your search criteria, instead of appearing in the results grid, the record opens automatically.

- Select **Show classic search results when using enhanced search** to revert the search results grid to the way it displayed before the 7.92 release of *The Raiser's Edge*. When you select this checkbox the results grid will display the constituent's name, address, city, state, and constituent ID.

Note: You cannot use classic search view if enhanced search is disabled on the Open screen.

- When you click **Reset to Default**, any filters you established for the search are cleared, and the default query for the record type is used in the search.

- Select a **Default <Record Type> Search Field**. The cursor defaults to this field whenever you access the Open screen.

When you click **Find Now** on the Open screen, the program searches for all records of this type that meet your selected criteria. The records list in the Results grid. On some Open screens, such as those for constituents and gifts, you must first enter criteria in the **Last/Org name** field before the **Find Now** button is enabled. For more information on selecting criteria, see "Finding and opening a record" on page 54 of this book.

When you click **New Search**, all criteria field entries are removed and the selected query is reset to the default query.

When you click **Expand Results**, the grid is enlarged so you can view more entries for searches with many results.

▶ **Finding and opening a record**

All Open screens differ slightly. You can select different filters for each record type; however, all Open screens work in essentially the same way. For this procedure, we will focus on opening a constituent record.

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

2. Click the **Constituents** link. The Constituents page appears.
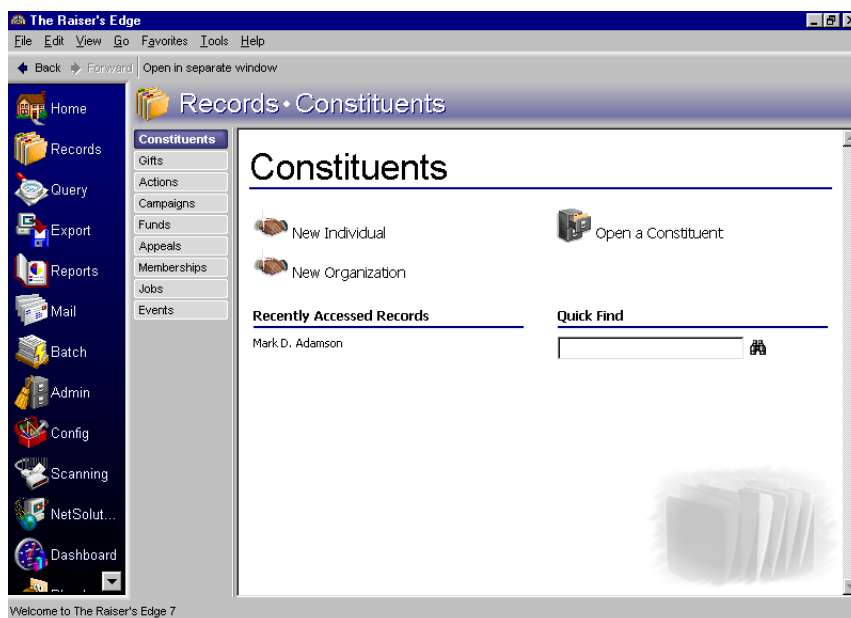
3. On the Constituents page, you can use the **Quick Find** feature if you know all or part of the name of the constituent whose record you want to open. Enter a single name (or part of a name) into the field and click the binoculars or press ENTER on your keyboard. *The Raiser's Edge* searches for a constituent with a last name (or organization name) matching your entry. If the program finds more than one match, the Open screen appears listing those constituents - both individual and organization. For example, if you enter the letter "a" and click the binoculars, the Open screen appears displaying all constituents whose last name or organization name begins with the letter a.

If you enter a space between two letters or names, the program searches for the first letter or group of letters as the first name and the second letter or group as last name. For example if you enter "a andrews" and have two constituents with the last name Andrews, one with the first name Alison and the other with the first name Anne, the open screen appears listing both records.

If your entry in the **Quick Find** field closely matches a single record, that record opens. For example, if you enter "a andrews" and you have only one constituent with the last name Andrews with a first name that begins with a, that record opens.

If the program finds no match for your entry, the Open screen for constituents appears so you can use its features to create a more detailed search for the record.

4. To perform a more detailed search, from the Constituents page, click **Open a Constituent**. The Open screen for constituents appears.

5. "Constituent" appears in the **Find** field because it is the type of record you selected to open. You can add the criteria from an existing query or one you create from this screen as part of your search. In the **Search using query** field, you can select an existing query or create a new one.

Warning: We recommend you search by one or two of the most helpful criteria types because the results that appear in the grid must match all criteria you enter. Adding too much criteria information in the **Find Constituents that meet these criteria** fields can actually prevent you from finding a constituent.

6. Under **Find Constituents that meet these criteria**, decide how you want to filter the constituent records for this search by entering information in the criteria fields. You can enter a value in all the fields or none, depending on how you want to filter your search. However, keep in mind that adding too much criteria can actually prevent you from finding constituents. You will probably need to enter criteria in only one or two fields.

If you select a new or existing query in the **Search using query** field, **The search query is not the default. Click here to reset.** appears. To clear the criteria from the search query, click this link.

Note: You can enter the first few letters or characters in the criteria fields under **Find Constituents that meet these criteria** if you do not know the correct spelling or number. You can also use the wildcard characters * and ? as a substitute for all or part of your entries in these fields.

In the criteria fields, you can enter "wildcard" characters to take the place of parts of a search phrase. Use the asterisk to take the place of a group of characters and the question mark to take the place of an individual character.

The available criteria fields for a constituent search are:

• **Last/Org name**, **First name**, and **Middle name** - You can enter partial names or individual letters in these fields.
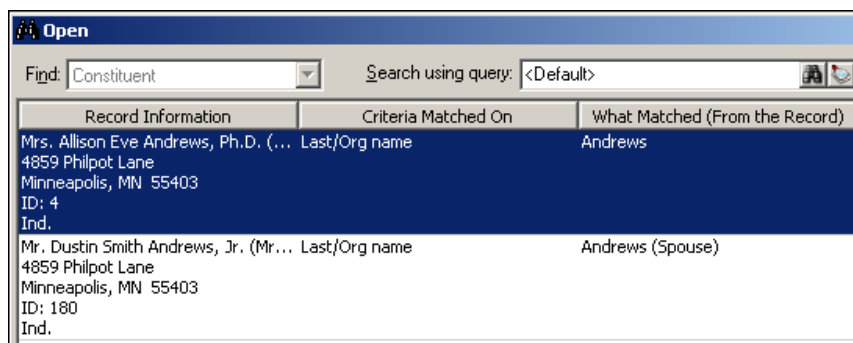
- **Suffix** - You can click the dropdown arrow to select from a list of system recognized suffixes, or enter it manually.

- **Spouse name** - To further specify the constituent you would like to search for, you can enter their spouse's name. You can enter partial names or individual letters in this field.

- **Constituent ID** - If you enter a single digit here more than one record may still appear in your search results. For example, if you enter "1", all records beginning with the number 1 in the constituent ID would be included as results for the search. If you enter "*1" all records that end in the number one would be included.

- **SSN** - As with the constituent ID, if you enter one or more digits in this field, all constituents who have the digit(s) at the beginning of their social security numbers appear in search results. For example, if you enter 471, all constituents whose social security numbers begin with those numbers appear in your results.

- **Membership ID** - This field is available only if you have the optional module *Membership Management*. Use this field to filter results in the same way you use the **Constituent ID** field.

- **Bank accnt no.** - You can filter constituents by bank account number. For example if a specific bank starts all its account numbers with the numbers "1234", you can view all constituents whose bank accounts numbers begin with this number by entering "1234*" in this field.

- **Address lines** - You can narrow search results by parts of constituent addresses. For example, if you enter "*Street" all addresses that end in Street are included.

- **City** - Use this field to narrow your search to include only constituents who live in a certain city. As with the other fields, you can enter only a partial name with wildcard operator, such as "*ville" so only constituents who live in a city ending in that phrase will appear in your results.

- **State** - You can enter a complete or partial state name to filter constituents. For example, if you enter "s?", constituents who live in South Carolina and South Dakota appear in results.

- **ZIP** - You can also filter constituents by zip code. For example, if you enter "2*", all constituents with a zip code beginning with 2 are included in your search results.

- **Phone** - As with the constituent ID, if you enter one or more digits in this field, all constituents who have the digit(s) at the beginning of their phone number appear in search results. For example, if you enter 471, all constituents whose phone number begin with those numbers appear in your results.

- **Email** - As with state, you can enter a complete or partial email address to filter constituents.

- **Class of** - This field is available only if you have the optional module *Alumni Tracking*. If you enter "1979", only constituents whose records indicate that they graduated that year are included in search results.

- **Credit card no.** - You can filter constituents by credit card number. For example, because Visa card account numbers always begin with the number 4, you can enter "4*" to view all constituents whose records contain a Visa card number.

7. Select the **Display inactive constituents** checkbox (you can flag a constituent as inactive on the constituent record) if you want inactive constituents that meet your search criteria to appear in the Results grid. You can also mark a checkbox to **Display deceased constitutents** that meet your criteria.

8. The **Use enhanced search** checkbox is selected by default and enables searches to be "fuzzy," allowing for exact results as well as similar results. For example, if you enter "Neal" in the **First name** criteria field, first names with exact and similar spellings will appear in the results, such as "Neal," "Neil," and "Noel." This can help account for misspellings, but could possibly increase the length of time it takes to perform the search. If you deselect this checkbox, searches will not be "fuzzy." For example, if you enter "Neal" in the **First name** criteria field, only first names that contain those letters will appear, such as "Neal," "Neall," or "Neale."

9. You can select a checkbox to specify that results list for an **Exact match only**. If your entries in the **Find constituents that meet these criteria** fields do not exactly match a constituent, the record does not appear in the results grid.

10. Select the **Check aliases**, **Check contact name**, and **Check nickname** checkboxes if you want this information to be searched when the program looks for records that meet your criteria. For example, if you specify the **First name** "Charlie", and mark the **Check nickname** checkbox, constituents with either the first name or nickname of Charlie are included in your search results.

Note: You must enter criteria in at least one field in searches for constituents or gifts before the **Find Now** button is enabled.

11. After you finish entering search criteria, click **Find Now**. If the search criteria you entered matches a record in the database, the constituent lists in the grid on the Open screen. If you entered the first few letters or characters in the criteria fields, or used general criteria such as the **City**, more than one constituent may appear in the grid.

The results display in the order of which constituents best matched your search criteria. For example, if you entered information in five different criteria fields, and someone in your database matched all five, they would appear first in the list. In the results grid, you can see on what fields each constituent was matched. This helps you ensure you have found the correct constituent.
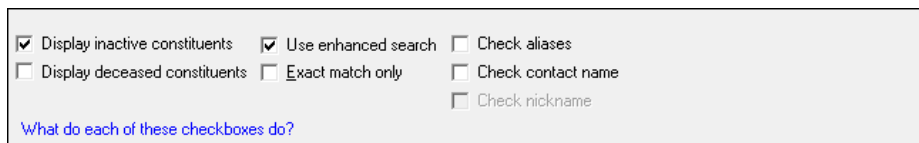

You may find that the same record appears more than once in the grid. You can limit duplicates of the same record in some cases by not marking the **Check contact name** checkbox. Additionally, if phone number and phone type are included in the output of the query on which the search is based, duplicate listings appear for each different phone number on the main constituent record.

12. In the grid, double-click the constituent record you want to open. The constituent record appears.

What Do Each Of These Checkboxes Do?

The Open Screen provides a number of criteria options to narrow the results of your searches. Along with the criteria fields, there are checkboxes at the bottom of the screen that allow you to further specify the results that return when you perform a search.

- **Display inactive constituents** - This checkbox is selected by default and allows constituents marked as inactive to appear in search results. Deselect the checkbox to exclude inactive constituents in the results (you flag constituents as inactive on the constituent record).

- **Display deceased constituents** - Select this checkbox to allow constituents flagged as deceased to appear in search results (you flag constituents as deceased on the constituent record).

- **Use enhanced search** - This checkbox is selected by default and enables searches to be "fuzzy," allowing for exact results as well as similar results. For example, if you enter "Neal" in the **First name** criteria field, first names with exact and similar spellings will appear in the results, such as "Neal," "Neil," and "Noel." This can help account for misspellings, but could possibly increase the length of time it takes to perform the search. If you deselect this checkbox, searches will not be "fuzzy." For example, if you enter "Neal" in the **First name** criteria field, only first names that contain those letters will appear, such as "Neal," "Neall," or "Neale."

- **Exact match only** - Select this checkbox to only display results that match the criteria you entered exactly. For example, if you enter "Andrew" in the **Last/Org name** criteria field, only constituents with the last name "Andrew" will appear, and not "Andrews."

- **Check aliases** - Select this checkbox to include aliases in the search the program performs. For example, if you enter the **Last/Org name** "Smith" in the criteria fields, and select the **Check aliases** checkbox, constituents with either the last name or alias of "Smith" are included in your search results.

- **Check nickname** - Select this checkbox to include nicknames in the search the program performs. For example, if you specify the **First name** "Charlie" in the criteria fields, and select the **Check nickname** checkbox, constituents with either the first name or nickname of "Charlie" are included in your search results.

- **Check contact name** - Select this checkbox to include contact names in the search the program performs. For example, if you specify the **First name** "Charlie" in the criteria fields and select the **Check contact name** checkbox, constituents with either the first name or contact name of "Charlie" are included in your search results.

Saving Records

The Raiser's Edge offers a variety of ways to save a record. You can save a record as you work on it, save it and open a new record, or save it and return to the main screen for that type of record. You can set how often you want to automatically save batches on the Batch tab of User Options.

▶ **Saving a record**

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

2. Locate and open a record you want to change. For more information about opening records, see "Finding and Opening Records" on page 53.

3. If you want to save any changes you made and keep the record open to continue working, click the **Save** button on the toolbar or select **File**, **Save** from the menu bar.

4. If you want to save changes, close the current record, and open a new one, select **File**, **Save and New** from the menu bar or click the down arrow beside the **Save and Close** button on the toolbar. A drop-down menu appears. Click **Save and New**.

5. To save your changes, close the record, and return to the main screen for that type of record, select **File**, **Save and Close** from the menu bar or click **Save and Close** on the toolbar.

Deleting Records

Warning: Before you delete a record, we strongly recommend you make a copy of your data by either backing up your database, or running and saving a profile of the item you are deleting.

When you delete a record, you completely remove it from your database. An alternative to deleting is to make the record inactive. Certain items, such as attributes or table entries, cannot be deleted as long as they are in use on a record. Many items have unique messages or warnings that appear when you attempt to delete them. For more information, see the documentation for that specific item. Remember, deleting any item permanently removes it from your database. There is no undo for deleted items.

▶ **Deleting a record**

For this procedure, we will delete a constituent record. When you delete a record, you remove it from your database entirely.

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

2. Click the **Constituents** link.

3. Locate and open the constituent record you want to delete. For more information about opening records, see "Finding and Opening Records" on page 53.

4. From the menu bar, select **File**, **Delete**. The following message appears.
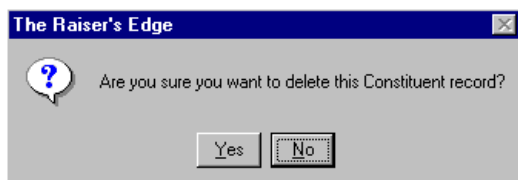
5. Click **No** to return to the record without deleting it.

6. Click **Yes** if you are sure you want to permanently delete the record.

Inactive Records

> **Note**: Making records inactive is a good alternative to deleting them. Inactive records remain in your database, but do not automatically appear in queries and searches or on reports. Inactive records cannot be associated with other records.

As an alternative to deleting a record, you can make it inactive. Inactive records do not automatically appear in searches, queries, or reports and cannot be associated with other records. However, unlike deleted records, they remain in your database for historic purposes. For example, you cannot associate gifts with an inactive fund, but the information for that fund record is still available in your database.

If you want inactive records to appear in your queries, you can mark a user option to do so. If you want inactive records to appear as search results, you can mark a checkbox on the Open screen each time you search for a record of that type. Different reports vary, but for many of them you can mark a checkbox if you want to include certain types of inactive records. You can reactivate a record you have marked as inactive.

▶ **Making a record inactive**

You can make a record inactive by marking a checkbox. The location of the checkbox depends upon the type of record you are making inactive. For example, on an individual constituent record, the checkbox is located on the Bio 1 tab.

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

2. Click the **Constituents** link.

3. Locate and open the constituent record you want to make inactive. For more information about opening records, see "Finding and Opening Records" on page 53 of this book.

4. Select the Bio 1 tab.

5. In the **This constituent** frame, mark the **Is inactive** checkbox. Now, unless you specify otherwise, this constituent will not appear in searches, queries, or reports.

6. Click **Save and Close** on the toolbar to save your changes and close the record.

Adding Attributes

Attributes are bits of useful information you can attach to a record. Because you create attributes, you can use them to customize *The Raiser's Edge* to suit your organization's needs. Attributes are created and stored in the **Attributes** link of *Configuration*. Use attributes to define specialized information for your records — information you want to track, but for which no field is available in *The Raiser's Edge*. In *Configuration*, you can create attribute tables, such as constituent **Interests**, and define entries such as "Golf" or "Photography" to more accurately target your solicitations. For more information about creating attributes, see the Attributes section in the "Configuration" chapter of the *Configuration and Security Guide*.

You can add attributes to all records. They are specific by record type. For example, attributes for a gift are available only for gifts, not constituents or other records.

▶ **Adding an attribute to a record**

Attributes can be added to records throughout *The Raiser's Edge*. This procedure will demonstrate how to add an attribute to a constituent record, but the same method can be used to add an attribute to any record type.

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

2. Click the **Constituents** link.

3. Locate and open the constituent record to which you want to add an attribute. For more information about opening a record, see "Finding and Opening Records" on page 53.

4. Select the Attributes tab.
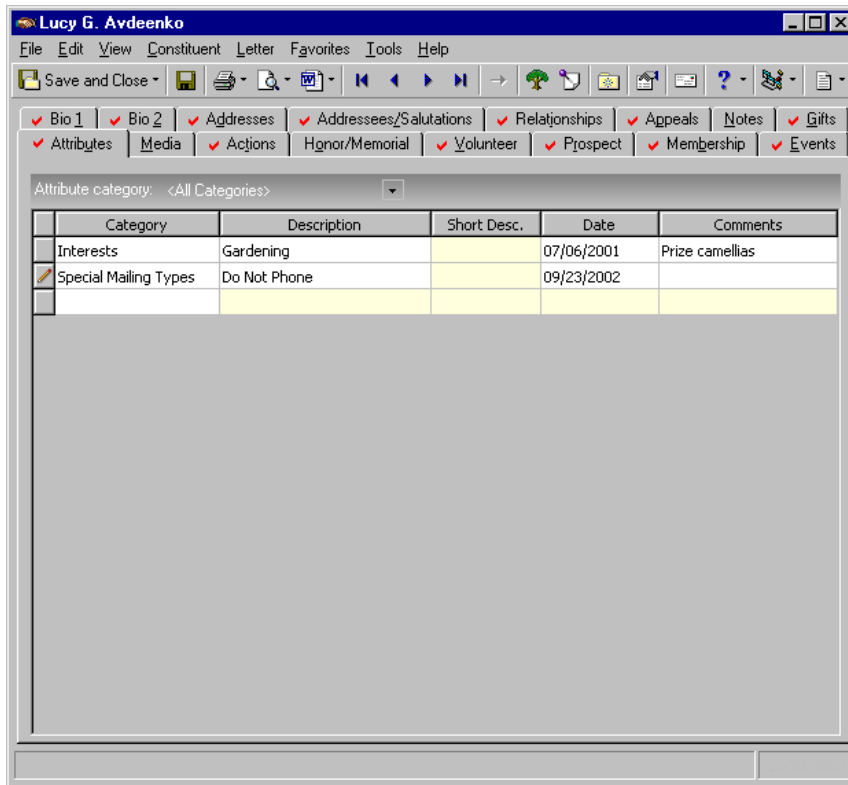
5. In the **Attribute category** select <All Categories> to add new entries or edit existing ones. If you select an individual category for which an entry already exists, your selection populates the **Category** column and all other columns in the grid are locked and cannot be edited. If an entry does not already exist in the selected category, the grid is locked as empty.

6. In the Attributes grid, when you place the cursor in the **Category** column, you can click the down arrow to select from the list of entries established in *Configuration*.

7. Select a **Description**. If the attribute is defined as a table you can click the down arrow to select an entry. If the attribute is defined as a table with a short description (in *Configuration*), the **Description** column is locked and the **Short Desc.** column is enabled. You can click the down arrow to select an entry in it also.

8. Enter the **Date** you are adding the attribute to the record.

9. Enter any additional **Comments** you would like to associate with the attribute. For example, if you have a **Category** called "Special Mailing Types", and a **Description** of "Do not send newsletter", you can add a comment such as "Constituent will notify us when he wants to receive the newsletter."

10. Click **Save** on the toolbar to save your entry and keep the record open. Click **Save and Close** to save your entry and close the record.
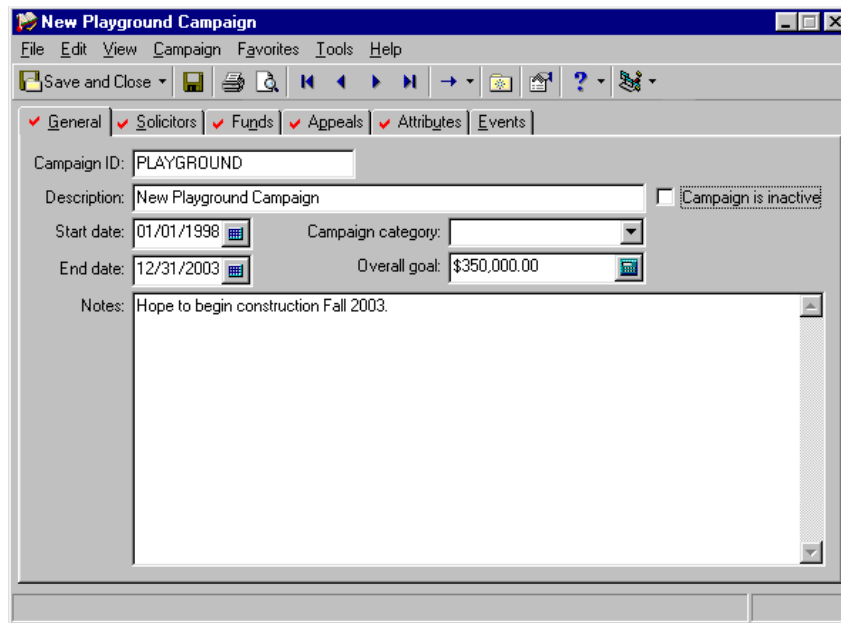
Adding Notes

You can use notes to include useful information and messages you want to remember with your records. Some records have a field where you can enter notes on the General tab. Others have a note field on the Attributes/Notes tab.
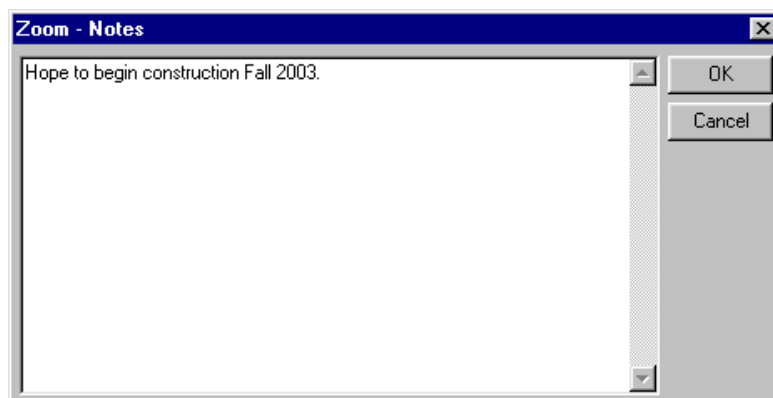
▶ **Adding a note**

For this procedure, we will add a note to a campaign.

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

2. Click the **Campaigns** link.

3. Locate and open the campaign record on which you want to add a note. For more information about opening a record, see "Finding and Opening Records" on page 53.

4. Select the General tab.

5. Enter any information you want to include with the record in the **Notes** field. For example, you can include construction date information for building campaigns, or the number of scholarships you hope to provide with a scholarship campaign.

6. While the cursor is in a **Notes** field, you can press **F7** on your keyboard or select **View**, **Zoom** to access the Zoom - Notes screen for a different view of the text you are entering.

7. Click **OK**. You return to the General tab.

8. Click **Save and Close** on the toolbar to save your note and close the campaign record.

Unlocking Optional Modules

Note: For information about purchasing optional modules, contact our Sales department at 1-800-443-9441.

Optional modules such as *Event Management*, *Membership Management*, and *Alumni Tracking* enable you to customize **The Raiser's Edge** to meet the specific needs of your organization. When you purchase an optional module from Blackbaud, you are given a code. You must enter this code to "unlock" or activate the optional module.

▶ **Unlocking an optional module**

1. From the shell menu bar, select **Tools**, **Unlock Optional Modules**. The Unlock Optional Modules screen appears.
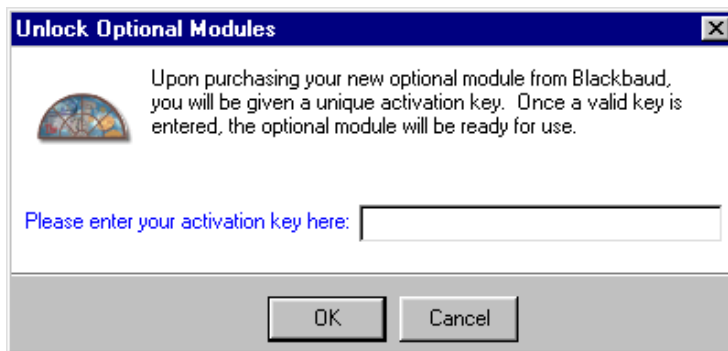
Note: The optional module *RE:Open* requires an additional step for unlocking. After you enter the activation key, you must also enter a **Username** and **Password** to use when you connect **The Raiser's Edge** database to external applications.

2. In the **Please enter your activation key here** field, enter the code you were given when you purchased the optional module. Click **OK**. If you enter the code incorrectly, a message appears.
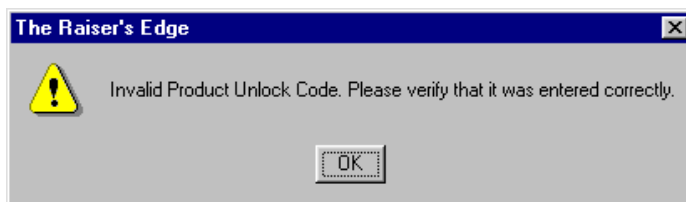
Note: With the optional module *RE:API*, you must enter a serial number (provided by Blackbaud) with every application you write. This number is similar to a house key you use to unlock your house each time you go in. On each program you write, you must enter the number.

3. Click **OK** and enter the activation key again. After you enter the key correctly a message appears.
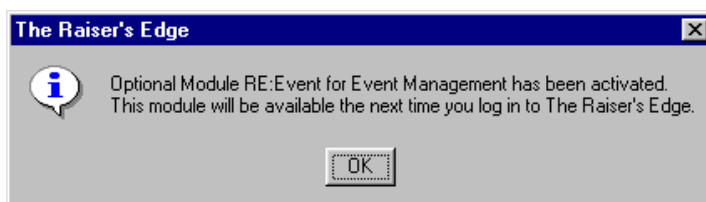
4. Click **OK** to clear the message. Before you can use the optional module, you must log off and log back into **The Raiser's Edge**.

Selecting Columns in Grids

Grids are used extensively throughout *The Raiser's Edge* to enter and store information. In many grids, you can determine which columns display. For example, you can determine which columns show in the Media grid on the Media tab of a constituent record. The columns you select to display on a grid affect only workstations you enter using your password. All other users are unaffected by your selections.

▸ **Selecting columns in a grid**

For this procedure, we select the columns to appear in the Relationships grid on the constituent record Relationships tab.

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

2. Click the **Constituents** link.

3. Open a constituent record. For more information about opening records, see "Finding and Opening Records" on page 53.

4. Select the Relationships tab.
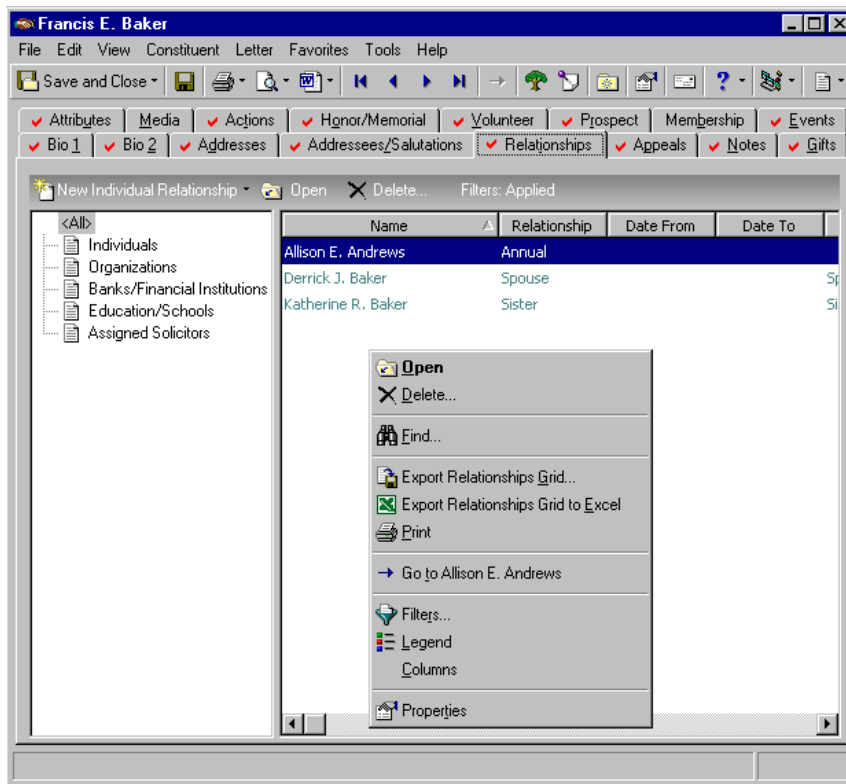
5. Right-click your mouse anywhere in the grid on the right. A shortcut menu appears.

6. Select **Columns** from the shortcut menu. The Columns screen appears.

Note: The columns you select to display on a grid affect only workstations you enter using your password. All other users are unaffected by your selections.

7. In the **Columns** box, select a column you want to display in the grid. Use the right arrow to move the column into the **Display these columns** box. Use the left arrow to mo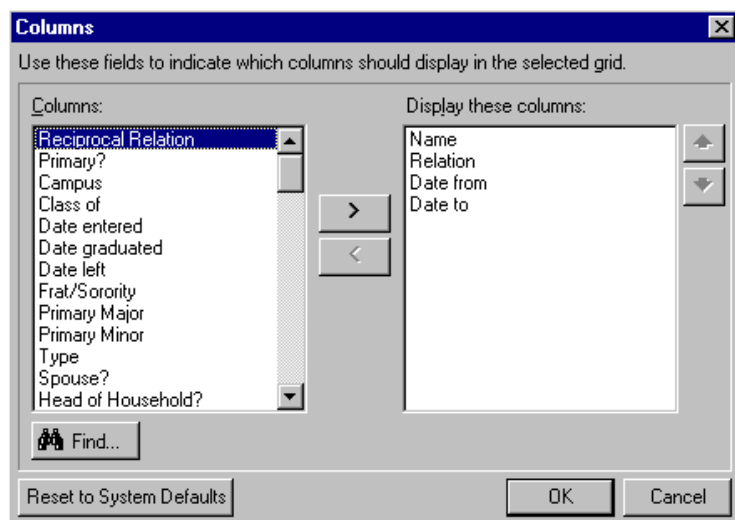ve any columns you do not want to include in the grid out of the **Display these columns** box. For example, using the columns selected in the previous screen, the Relationships grid appears as follows.
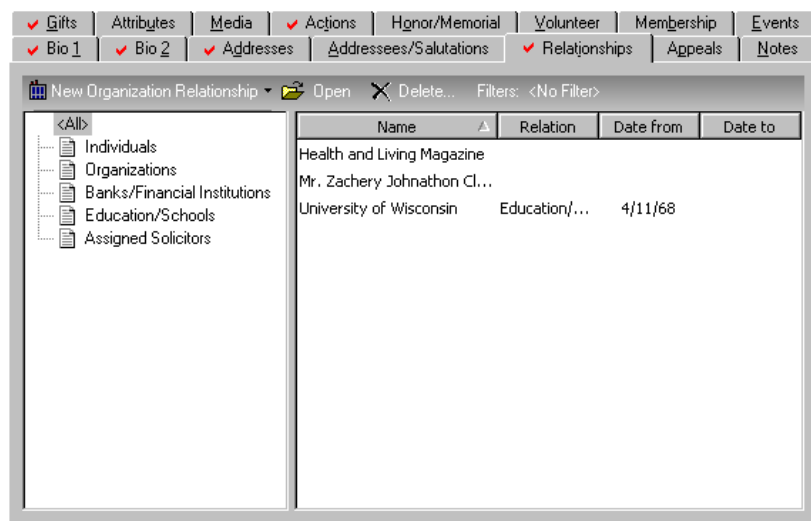
8. On the Columns screen, use the up and down arrows to adjust the order of the entries in the **Display these columns** box. The order here determines the order in which they list in the grid. The top entry in the **Display these columns** box lists as the first entry (left to right) in the grid.

9. Instead of scrolling through all the entries in the **Columns** box, you can quickly find an entry by clicking **Find**. The Find screen appears. For more information on how to use the Find screen, see "Finding Fields or Other Items in Lists" on page 68.

10. If you click **Reset to System Defaults**, any changes you made to the grid are undone. If you click **Cancel**, any changes you made since you opened the Columns screen are not saved and you return to the Relationships tab.

11. Click **OK** to save your changes. You return to the Relationships tab. These changes affect the Relationships grid on all your constituent records.

Exporting Grids to Excel

You can use the Export to Excel shortcut command to send information from a grid to Microsoft *Excel*, where the information appears as a spreadsheet.

▶ **Exporting a grid to Excel**

The procedure for sending information to *Excel* is similar for all grids in **The Raiser's Edge**. This procedure demonstrates how to send information from the Gifts grid on the Gifts tab of a constituent record.

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

2. Click the **Constituents** link.

3. Open a constituent record. For more information about opening records, see "Finding and Opening Records" on page 53.

4. Select the Gifts tab.
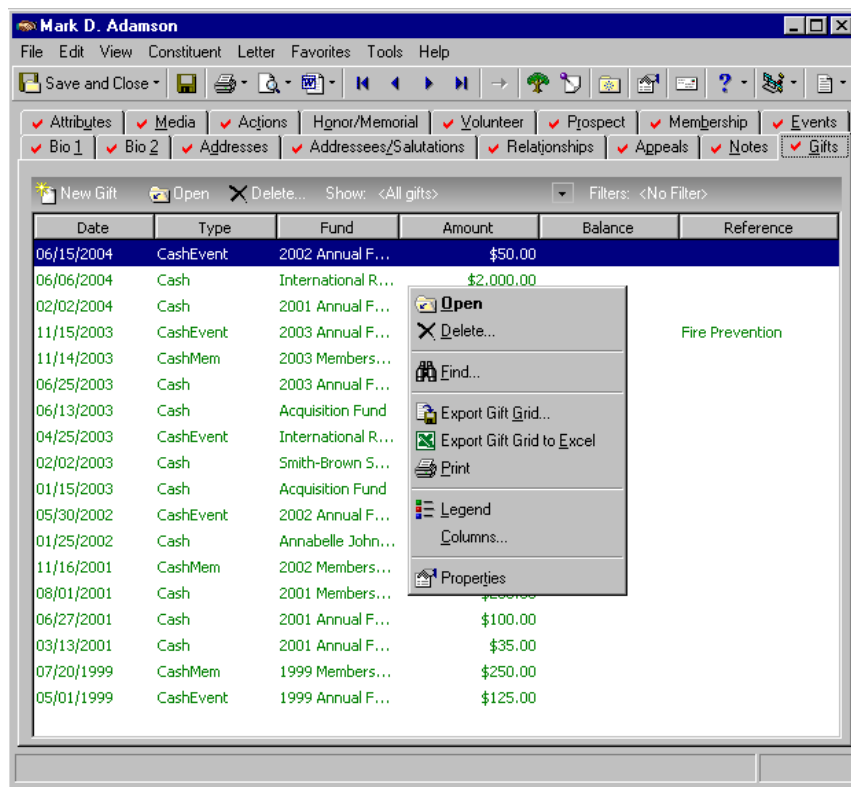
5. Right-click your mouse anywhere in the Gifts grid. A shortcut menu appears.
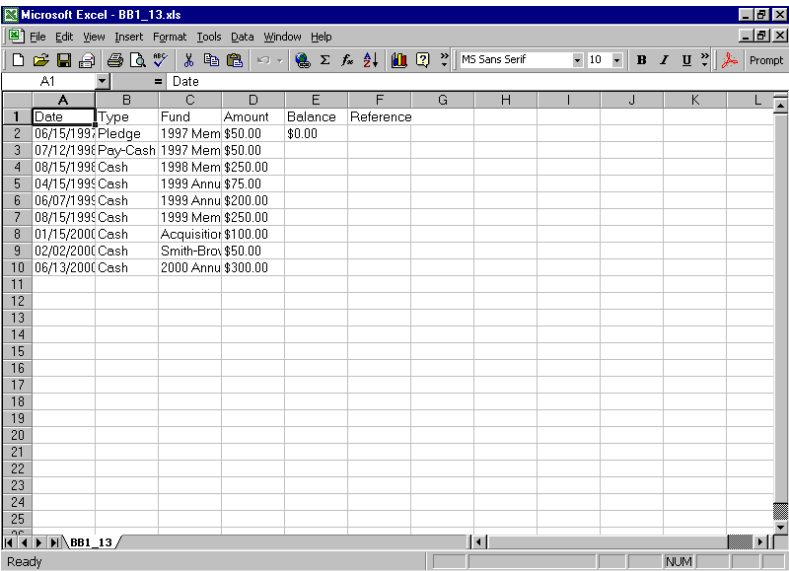
Note: You can also export a grid to *Excel* by selecting **Edit**, **Export Gift Grid to Excel** from the menu bar.

6. From the shortcut menu, select **Export Gift Grid to Excel**. *The Raiser's Edge* opens *Excel* and begins exporting the grid. A progress screen appears.
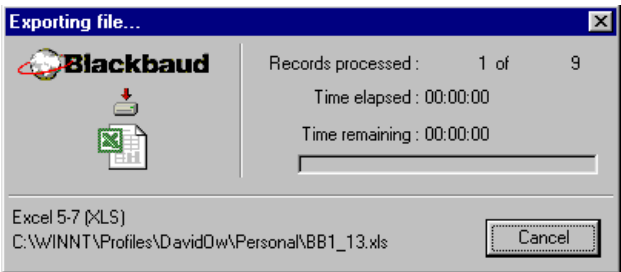
> **Note**: When you export a grid to *Excel*, the header row is automatically included. If necessary, you can delete the header row in *Excel*.

When the export is complete, the *Excel* spreadsheet appears containing the information from the grid.

You can now manipulate and use the information in *Excel* as you would any other spreadsheet.

Finding Fields or Other Items in Lists

The **Find** button is available in many areas of the program to help you locate specific fields or items from a list in a box or grid. It is particularly useful in saving you time scrolling through lists with so many entries that all are not visible at the same time in the box or grid. For example, you can click **Find** on the columns screen to find a column you want to include in a grid. When you click the **Find** button, the Find screen appears so you can define the search for a field or other item.

‣ **Finding a field**

   1. When you are in a grid or box with a large number of field entries, such as a list of entries for a table, you can select **Find** in the menu or click the **Find** button. The Find screen appears.
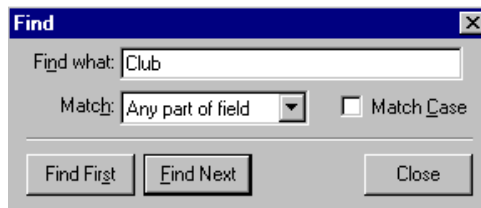
Note: If you are unsure of the spelling or wording of an entry you want to find, you can substitute the wildcard character ? for part, or the character * for all of your entry in the **Find what** field.

   2. In the **Find what** field, enter the name of the entry you want to find. If you are unsure of the spelling of the field for which you are searching, you can substitute the wildcard character ? for part, or the character * for all of the entry.

   3. In the **Match** field, select whether you want your entry in the **Find what** field to match: Any part of field, Whole field, or Start of field.

   4. If you want the search to match any capitalization in the field name, mark the **Match case** checkbox.

   5. When you click the **Find First** button, the first match that meets your search criteria is highlighted in the box or grid.

   6. Click the **Find Next** button to find any additional entries that meet your criteria.

   7. After you locate the entry you want to find, click **Close** to exit the Find screen. You return to the area from which you accessed the Find screen and the last field found is highlighted.

Sorting Information

You can sort information in many lists and grids throughout *The Raiser's Edge*.

Sorting Lists

You can use the sort screen to sort lists of items in many areas of *The Raiser's Edge*. For example, if you have security rights to add and edit table entries, you can sort the order in which table entries appear. For lists with numerous entries you may want to sort the order alphabetically to help you find particular entries quickly.

‣ **Sorting a list**

Sorting options vary for lists. Some lists are sorted by clicking a **Sort** button on the screen while others have a **Sort** button on the action bar. For this procedure, we sort the entries for **Constituent Codes**.

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

   2. Click the **Constituents** link.

   3. Open an individual constituent record. For more information about opening records, see "Finding and Opening Records" on page 53.

   4. Select the Bio 2 tab.

5. Click your mouse in the **Code** or **Description** field (depending on whether you select to view and enter data in code tables by long description in User Options) of the **Constituent Codes** grid and press **F7** on your keyboard. The Constituent Codes screen appears.
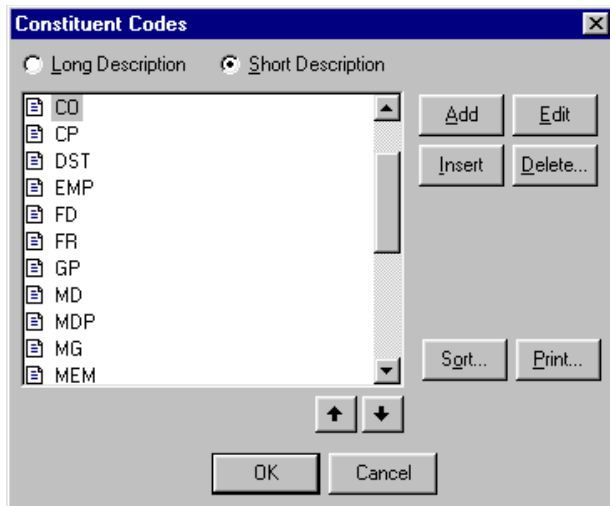
6. Click **Sort**. The Sort Table Options screen appears.
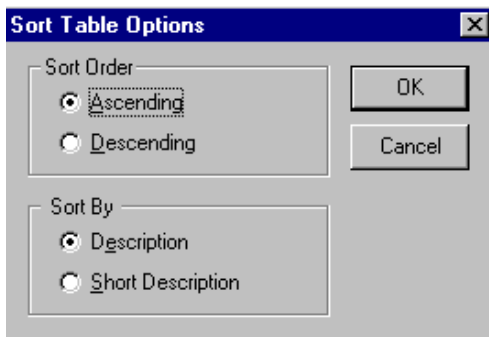
7. In the **Sort Order** frame, mark **Ascending** if you want to sort in alphabetical order. Mark **Descending** if you want to sort in reverse order from Z-A.

8. In the **Sort By** frame, mark **Description** if you want to sort the table entries by long descriptions. Mark **Short Description** if you want to sort them by short descriptions.

9. Click **OK** to save your selections and return to the Constituent Codes screen.

10. Click **OK** to save your changes. You return to the Bio 2 tab.

Sorting Information in Grids

You can also sort the information in some grids. You can sort by column heading (**Date**, **Description**, **Status**, for example) in ascending or descending order.

▶ **Sorting information in a grid**

Available columns vary in different grids. This procedure uses the grid on the Actions tab of the constituent record, but the same principles can be used on any sortable grid in *The Raiser's Edge*.

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

2. Click the **Constituents** link.

3. Open a constituent record. For more information about opening records, see "Finding and Opening Records" on page 53.

4. Select the Actions tab.

5. Click the **Date** column heading on the grid. The list displays in ascending order with the oldest date at the top.

6. Click the heading again and the order reverses to descending order, with the oldest date at the bottom.

Date ▽	Category	Type	Solicitor(s)	Status	Complet...
8/1/2000	Task/Other	Birthday		Continuous	No
3/15/2000	Task/Other	Board Meeting		Continuous	No
9/15/99	Task/Other	Board Meeting		Continuous	No
6/15/99	Task/Other	Board Meeting		Continuous	No

7. Click any other heading to reverse the sort order of the grid. When you click the heading, an arrow appears showing the direction in which the information is currently being sorted.

Establishing File Locations

You can use the *Windows* File Location screen to search for a particular file if you do not know the specific location of the document. For example, you can use this screen to find a media file to include on a constituent record or to locate a letter in your word processor.

▶ **Establishing a file location**

You can establish a file location from any field with a **Browse** button.

1. When you click **Browse**, the File Location screen appears so you can scroll through your directories for a file.
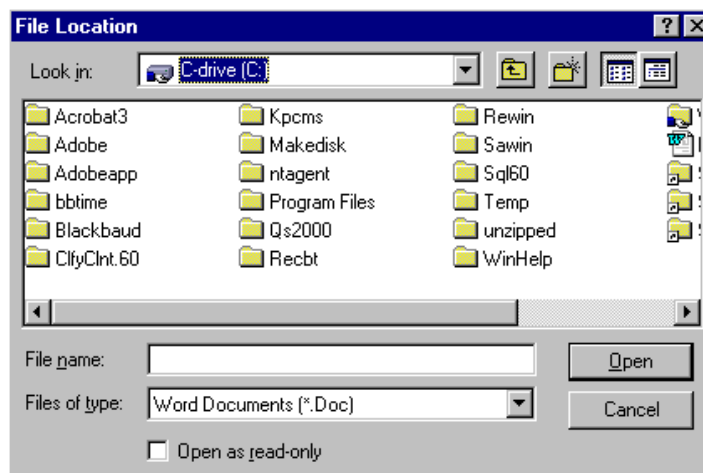
2. Specify a folder or drive for *The Raiser's Edge* to **Look in** for the file.

3. Enter a **File name**. You can use the wildcard character * as a substitute for all or part of the file name.

4. Specify the extension of the file you are looking for in the **Files of type** field. If you do not know the extension of the file, you can again use the wildcard character as a substitute.

5. The **Open as read-only** checkbox is not always visible. When available, you can mark it if you do not want to make any changes to the file you are locating.

6. Depending on the area of the program from which you access the File Location screen, when you click **Open**, the specified file opens or it is selected to be used in a function. You can click **Cancel** to close the File Location screen without opening or selecting the file.

Formatting Legends

Legends most frequently identify the status or type of a record in a grid. You can use legends to identify different records at a glance. For example, you can specify that pledges display in a different color than other gifts on the Gifts tab of the constituent record.

Note: You can also format legends on the Color tab in User Options. Your selections for legend displays affect only workstations you enter with your password. Other users are unaffected by your settings.

▶ **Formatting a legend**

For this procedure, we will specify that pledges appear in blue text on the Gifts tab of constituent records.

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

2. Click the **Constituents** link.

3. Open a constituent record. For more information about opening records, see "Finding and Opening Records" on page 53.

4. Select the Gifts tab.
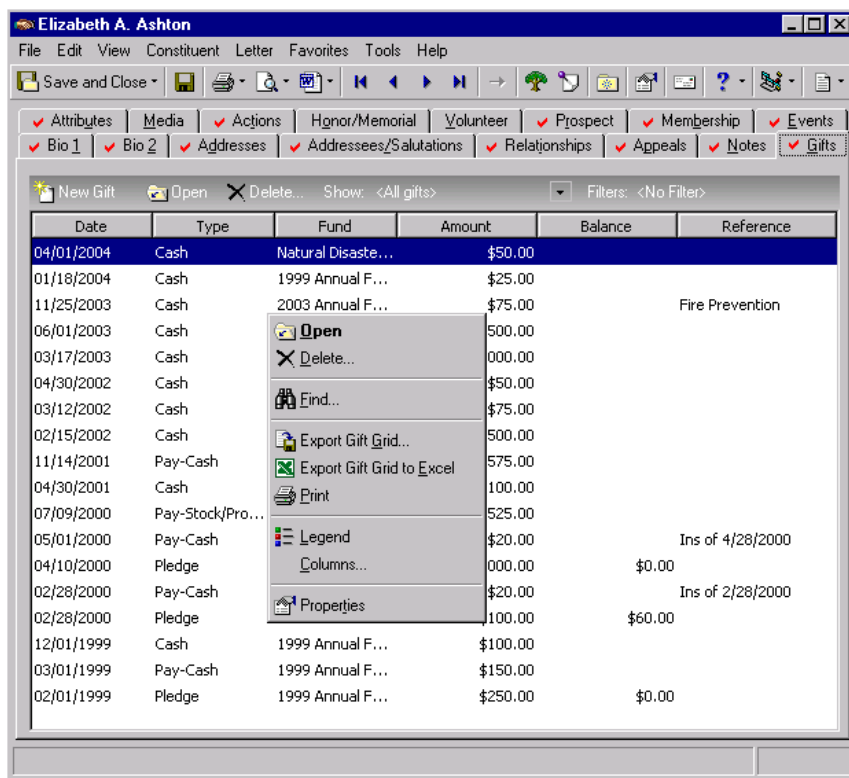
5. Right-click in the gifts grid. A shortcut menu appears.

Note: The order in which the options appear in the **Legend Options** box determines which color setting takes precedence if a record qualifies for more than one. If a record qualifies for more than one text option, bold and italic formatting matches that of the first entry in the legend options list, and the suffixes are connected in order of importance.

6. Select **Legend** from the shortcut menu. The Legend screen appears.
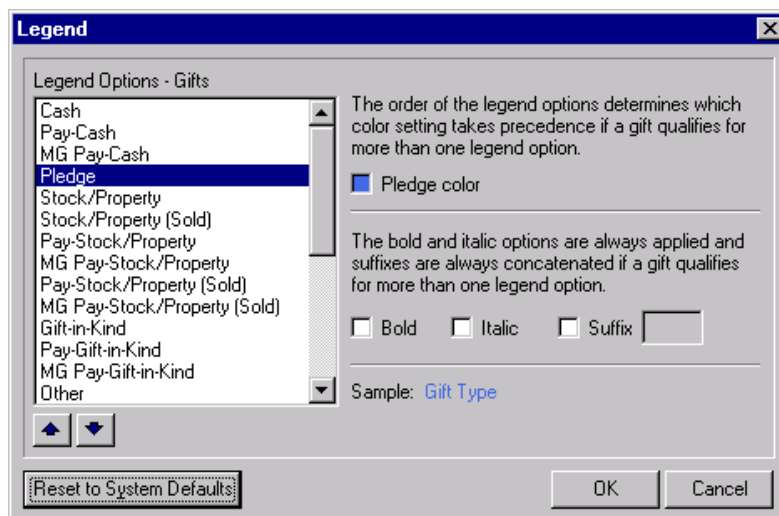
7. In the **Legend Options - Gifts** box on the left, scroll down to Pledge. Pledge display options appear on the right.

8. Click the **Pledge color** box. The Color screen appears so you can select the color in which you want pledges to appear in the gifts grid.
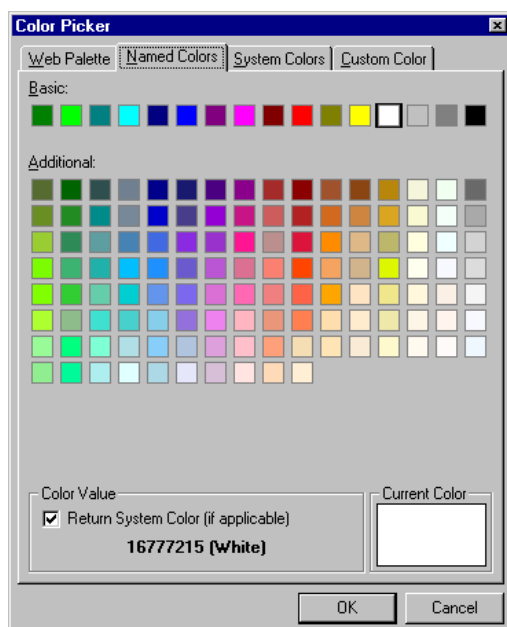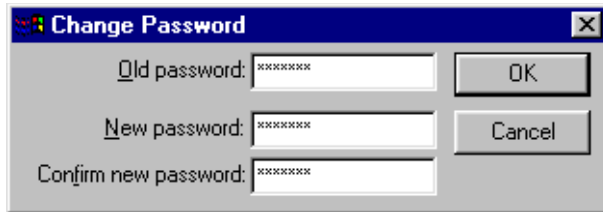
9. Select a color and click **OK**. The Legend screen appears with that color filling the **Pledge color** box. For more information about the Color screen, see the Colors tab section in the "User Options" chapter of this book.

10. Select whether you want pledges to appear in **Bold** or **Italic** font in the gifts grid.

11. Mark the checkbox if you want pledges to appear with a **Suffix**. Enter the suffix in the accompanying field. For example, you can add "- PL" to further help differentiate pledges from other gifts.

12. The **Sample** shows how your formatting selections will appear in the grid.

13. Click **OK** to save your selections, **Cancel** to close the Legend screen without saving your most recent changes, or **Reset to System Defaults** to undo any legend changes and return to program settings.

Changing Passwords

If you have security rights, you can change your password from most areas of the program. We recommend you change your password periodically to maintain security. If you forget your password, your supervisor can look it up for you.

▶ **Changing your password**

1. From your Home page or any other main page, select **Edit**, **Change Password** from the menu bar. The Change Password screen appears.

> **Note**: For privacy, only asterisks display when you make entries in the **Old password**, **New password**, and **Confirm new password** fields.

2. Enter your current password in the **Old password** field.

3. Enter the new password you want to use in the **New password** field.

4. Enter the new password again in the **Confirm new password** field. Your entry must exactly match the **New password** field entry.

5. Click **OK** to save the new password.

Entering Dates

> **Warning**: To avoid confusion, we strongly recommend you always enter four-digit years on your records.

Fields requiring date information have a calendar button. You can use this button to help locate a date. You can also manually enter a date. In many date fields, *The Raiser's Edge* accepts and stores partial dates. For example, you can enter only a year for a constituent birth date. This is referred to as a "fuzzy" date.

To completely eliminate confusion and ambiguity, we strongly recommend you set the date format on the Date tab of the *Microsoft Windows* Regional Settings Properties screen to use four digits for the year, and always enter four digit years on your records.

When you enter a date range, such as a relationship **Date from** and **Date to**, you do not have to enter both dates. If you do enter both dates, the **Date from** must be on or before the **Date to** or a warning message appears. You must correct the dates before you can save the record.

▶ **Entering dates**

You can use the calendar button to help find the date you want to enter in a date field.

1. Place the cursor in a **Date** field. You can press **F3** on your keyboard to automatically enter the current date. If you want assistance locating a date, click the **Calendar** button or press **F7** on your keyboard. The calendar appears.
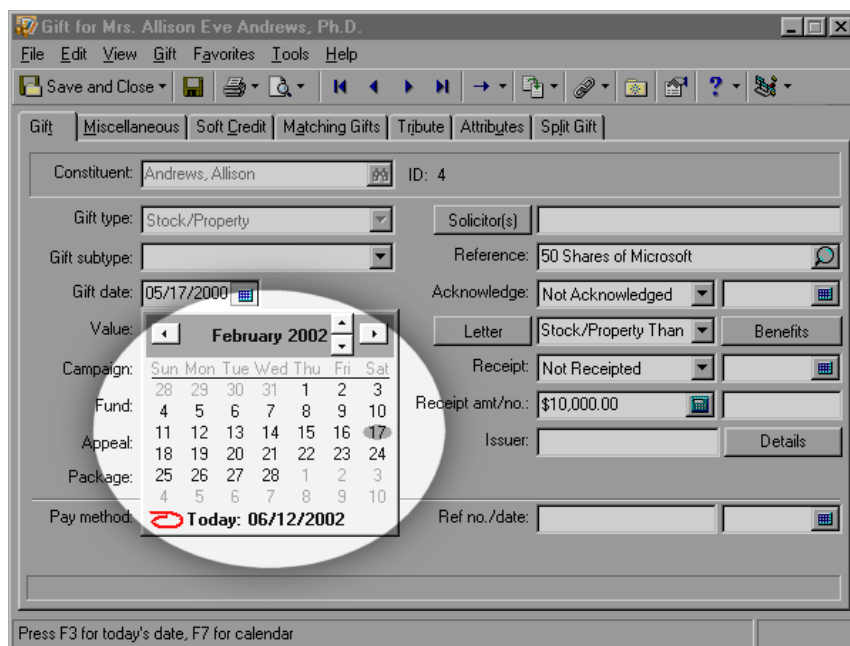
Note: When you enter a date range, such as a relationship **Date from** and **Date to**, you do not have to enter both dates. If you do enter both dates, the **Date from** must be on or before the **Date to** or a warning message appears. You must correct the dates before you can save the record.

2. Click the left or right arrows to scroll through the months. If you click the year at the top of the calendar, up and down arrows appear so you can scroll through years. Click **Today** to return the calendar to the current date.

3. Double-click a date and the calendar closes. The selected date appears in the **Date** field.

Date Processing

The Raiser's Edge processes two types of dates. Standard dates always store the month, day, and year. Fuzzy dates can be entered and stored as month, day, and year; month and year; or year only. Date processing by *The Raiser's Edge* conforms to Microsoft's "windowing" standards. The years 00 to 29, when entered as two digits, are assumed to occur in the 21st century; for example, if you enter 01/01/04, the date would be 01/01/2004. The years 30 to 99 are assumed to occur in the 20th century; for example, if you enter 01/01/36, the date would be 01/01/1936. In *Windows* 2000, you can define the "window" for assigning dates to the 20th or 21st century.

Standard Dates

Date fields using standard dates always store the complete date. *The Raiser's Edge* formats the date based on your setting on the Microsoft *Windows* Regional Settings Properties screen. If you enter a less than complete date, *The Raiser's Edge* formats your entry into a full date. When you enter a less than complete date, make sure your entry is formatted into the date you intended to enter. We recommend you always enter the full date in standard date fields.

Fuzzy Dates

Fuzzy dates are less than complete dates. *The Raiser's Edge* allows you to enter and save incomplete dates in many date fields. Use fuzzy dates when you are unsure of a complete date. For example, if you do not know the day and month a constituent was born, but you do know the year, you can enter only the year in the **Birth date** field of the constituent record.

> **Warning**: Just because a date is valid does not mean it is the correct date you intended to enter. If you enter a less than complete date in a field, always check to make sure the date is formatted into the date you intended to enter.

With fuzzy date processing, you can enter different numbers of digits in a date field and *The Raiser's Edge* formats the digits into valid dates. Whether you enter dates with or without separators also affects how they are formatted by the program. Some digits cannot be processed into valid dates. For example, if you enter only a zero into a date field, *The Raiser's Edge* cannot format the entry into a valid date. Anytime you attempt to enter a date the program finds invalid, an error message appears when you attempt to save the record. Even though *The Raiser's Edge* allows you to enter incomplete dates, we strongly recommend you enter complete dates whenever possible to ensure the accuracy of your records.

Fuzzy date processing is based on your selection of date format (such as Month/Day/Year) on the Date tab of the Microsoft *Windows* Regional Settings Properties screen. The following examples are based on a setting of **MM/DD/YY** in *Windows*.

If you enter one digit, "A": If A equals 0, the date is invalid. If A is greater than 0, the date is formatted as MM/0A/YYYY with MM as the current month and YYYY as the current year.

If you enter two digits, "AB": If AB is a valid day for the current month, then the date is formatted as MM/AB/YYYY with YYYY as the current year. If AB is not a valid day for the current month, then the date is formatted as YYAB with YY being 19 or 20 depending on the value of AB. If AB equals 00, the date is formatted as 2000.

> **Warning**: Entering separators between digits changes the way *The Raiser's Edge* formats fuzzy dates. Always verify the date is correct when you leave a date field.

If you enter three digits, "ABC": If A equals 0, the 0 is dropped. If BC is a valid day for the current month, the date is formatted as MM/BC/YYYY with MM as the current month and YYYY as the current year.

If BC is not a valid day for the current month, the date is formatted as YYBC with YY as 19 or 20 depending on the value of BC. If A is greater than 0, the date is formatted as 0A/YYBC with YY as 19 or 20 depending on the value of BC. If you enter 000, the date is formatted as 2000.

If you enter four digits, "ABCD": If AB is a valid month, the date is formatted as AB/YYCD with YY as 19 or 20 depending on the value of CD.

If AB is not a valid month, if AB equals 00, the date is formatted as YYCD with YY as 19 or 20 depending on the value of CD. If you enter 0000, the date is formatted as 2000. If AB is 19 or 20, no formatting is needed.

If you enter five digits, "ABCDE": If AB is a valid month, the date is formatted as AB/0C/YYDE with YY as 19 or 20 depending on the value of DE.

If AB is not a valid month, if BC is a valid day for month A, the date is formatted as 0A/BC/YYDE with YY as 19 or 20 depending on the value of DE. 00000 is an invalid date.

If you enter six digits, "ABCDEF": If AB is a valid month, and CD a valid day for month AB, the date is formatted as AB/CD/YYEF with YY as 19 or 20 depending on the value of EF. All other dates, including 000000, are invalid.

If you enter seven digits, "ABCDEFG": If the first digit is 0, it is dropped and the rules for six digits are followed. If the first digit is not 0, the date is invalid. 0000000 is an invalid date.

If you enter eight digits, "ABCDEFGH": If AB is a valid month, and CD a valid day for month AB, the date is formatted as AB/CD/EFGH. All other dates, including 00000000, are invalid. If you enter more than eight digits, the date is invalid.
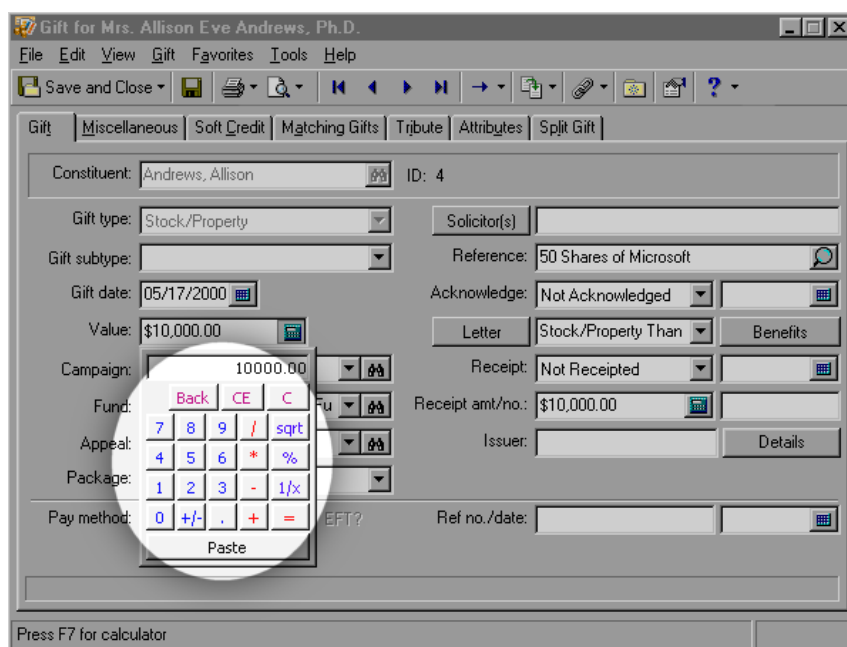
Entering Currency Amounts

Fields requiring monetary values have a calculator button to help you determine an entry.

▶ **Entering currency amounts**

You can use the calculator to determine entries in fields that use monetary values or you can enter amounts manually.

1. Place the cursor in a field that requires a monetary entry.

2. You can enter a number manually. You do not need to enter the currency symbol and decimal placement; they are determined in the **International** option of *Configuration*. For more information, see the International section of the "Configuration" chapter of the *Configuration and Security Guide*.

3. You can use the **Calculator** button to assist you in determining an entry for a currency field. When you click the **Calculator** button or press **F7** on your keyboard, the calculator appears.

4. Use the number and function keys on the calculator to indicate the amount you want to enter in the field.

5. Click **Paste** and the calculator closes. The selected amount appears in the currency field.

Using Default Sets

You can create default sets for many record types. A default set can contain entries for almost every field in a record. When you load a default set into a record, the values you entered for the set can automatically default into the fields on the record. If you repeatedly enter the same values in numerous record fields, you can create a default set with these values and use it to save time during data entry. For example, if most of your constituents are from the same city and state, you can create an "Address" default set with entries in the applicable address fields. You can use this set to save time when you add constituent records instead of entering the values manually each time.

The values are only defaults and you can change any field on a record once you have entered the default set. You can also load default sets into existing records. If a field in the record already contains a value, the default does not replace it, but default values from the set are entered in fields that do not contain data. However, after you load the default set, if you press **F2** on your keyboard while the cursor is in a field for which you defined a default, the default entry does overwrite the existing entry.

▶ **Creating a default set**

For this procedure, we create a default set to use when adding a new individual constituent.

Note: You can also select **Tools**, **Organize/Create Defaults** from the shell menu to create a new default set or view your saved default sets.

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

2. Click the **Constituents** link.

3. Click **New Individual**. The New Individual screen appears.

4. From the menu bar, select **Constituent**, **Load Defaults from**. The Individual Field Default Sets screen appears.
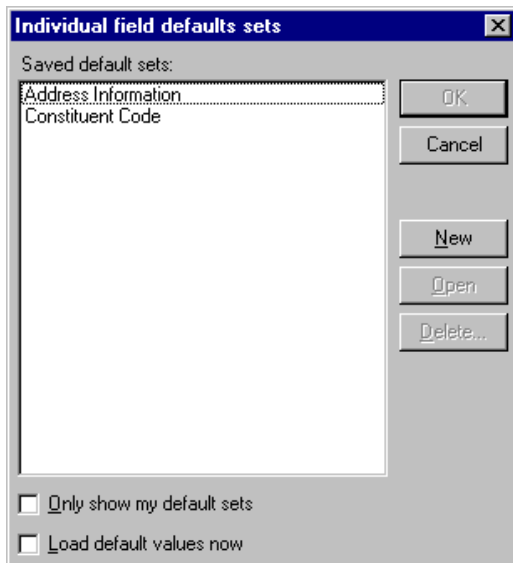
Note: You can also load default sets into existing records. When loading the set, if a field in the record already contains a value, the default does not replace it (unless the record has not yet been saved), but default values from the set are entered in fields that do not contain data. However, after you load the default set, if you press **F2** on your keyboard while the cursor is in a record field for which you defined a default, the default entry does overwrite the existing entry.

5. Any default sets you already saved appear in the **Saved default sets** box.

6. If you leave the **Only show my default sets** checkbox unmarked, all saved default sets appear in the **Saved default sets** box. If you mark the checkbox, sets created by other users do not appear in the box.

7. If you mark the **Load default values now** checkbox, when you select a default set and click **OK**, the values automatically load into the record.

If you leave this checkbox unmarked and click **OK**, the default values do not automatically appear in the record. To load the default values from a selected set into the new record, you must press **SHIFT** + **F2** on your keyboard. To load a value into a single field, place the cursor in the field and press **F2**.

8. To create a new default set, click **New**. The New Default Set screen appears.

9. Enter a descriptive **Name** for the default set such as "Address Information" or "Constituent Code". The name appears on the Individual Field Default Sets screen.

10. The tree view on the left lists all field categories for the record type. Your selection in the tree view determines which fields display on the right. In the preceding example, **Address and Phones** is selected in the tree view and the **Address** and **Phones** grids appear on the right.

11. You can define an entry for almost every field on the constituent record, but a default set can contain values for as few or as many fields as you want. A default set can even consist of an entry for only a single field.

    Entries that appear on a majority of your records are ideal for default sets. In the above example, the **Country**, **City**, and **State** field entries are set as defaults. Additionally, defaults are set for the **Phone Types** grid on the constituent record.

12. Click **Save and Close** on the toolbar to return to the Individual Field Default Sets screen. The name of the new set now appears in the **Saved default sets** box.

Viewing System Statistics

If you have security rights to *Administration*, you can view **System Statistics**. These statistics show the number of each type of record contained in *The Raiser's Edge*. The information is provided for viewing purposes only; you cannot edit the information. Using System Statistics, you can view up-to-date totals of all records in your database.

‣ **Viewing system statistics**

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

2. Select **System Statistics**. A message appears telling you the program is calculating system statistics. When finished, the System Statistics screen appears.
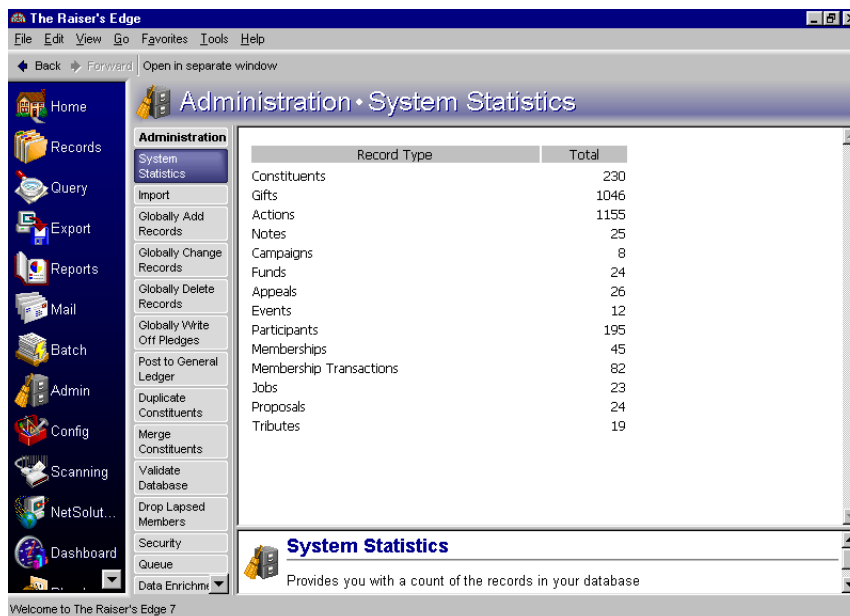
3. Every **Record Type** available in your database appears with the **Total** number of records in each.

4. You can sort the columns by double-clicking the column header.

5. To exit this link and return to the Administration screen, click **Admin** on the Raiser's Edge bar.

Setting Up Printers

Using the Print Setup screen, you can link your printer to *The Raiser's Edge* from your Home page or any record screen. You may already be familiar with this screen because it is common to most *Windows* programs. Use the Print Setup screen to designate a path to your printer and to enter a paper size, source, and orientation.

▶   **Setting up a printer**

1. From your Home page or any main page, select **File**, **Print Setup**. The Print Setup screen appears.
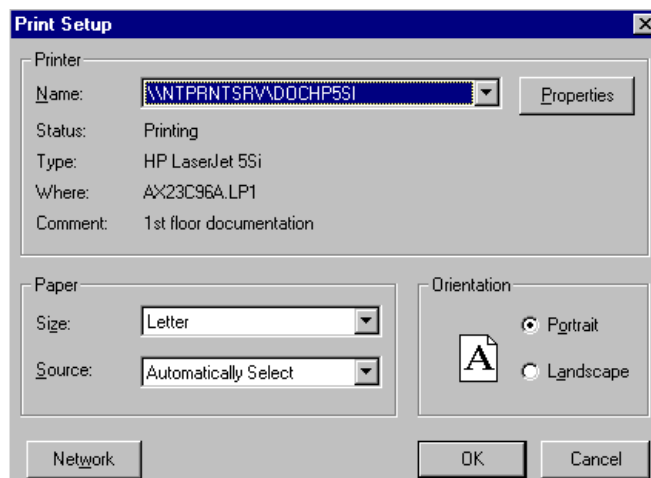
2. Select the **Name** of your printer. When you click the down arrow, *The Raiser's Edge* lists all printers you have set up for your computer. Click **Properties** to view Page Setup and Advanced properties established for the printer you specify.

Note: Some reports automatically select a paper orientation and override the default you set here. For these defaults to affect the other reports, you must select to base orientation on print setup rather than the report on the Reports tab of User Options.

3. In the **Paper** frame, specify the paper **Size** you use. Specify how the paper is fed to the printer in the **Source** field.

4. In the **Orientation** frame, mark an option to determine if you want to print in **Portrait** or **Landscape** format.

5. Click **Network** if you want to connect with a network printer to which you have not already set a path.

6. Click **OK** to save your selections or **Cancel** to close the Print Setup screen without saving any changes.

User Options

Procedures

User options give you the ability to customize the look of screens, to link **The Raiser's Edge** to other programs such as your word processor, to determine settings for saving information, and to establish a wide variety of default values. Select the options that best suit your personal needs, whether you want to open records directly from your Home page, change the color of text that appears in certain grids, or display constituents by ID number instead of name in reports. Because these options affect only workstations you enter with your password, select the settings with which you are most comfortable and which best fit your own personal data entry methods.

> **Note**: To access and change your user options, you must be given rights through the **Security** link of *Administration*. If you attempt to access User Options without security rights, a warning message appears informing you that you do not have rights to that area of the program.

Generally, user options specify defaults that help increase the ease and speed of your data entry. For example, if you use the same font and size text to create most of your reports, you can set them as defaults instead of having to specify that font and size each time you run a report. Remember, these are only defaults. You can still override them and select any font and size type you want to use in a report.

User options set preferences for many areas of the program. User options are stored in **The Raiser's Edge** database per individual user, so any workstation you enter with your password uses your settings. All other users are unaffected by the settings you select in User Options. If you are not granted security rights to change user options, your options default to those set by your supervisor.

Navigating in User Options

You can access User Options by selecting **Tools**, **User Options** from either the shell menu bar or a record menu bar. When you access User Options from the shell, the Options screen opens to the General tab. When you access User Options from another area in the program, the Options screen opens to the tab specific to that area. For example, if you select **Tools**, **User Options** from the menu bar of a fund record, the Options screen appears on the Records tab with Funds selected in the tree view.
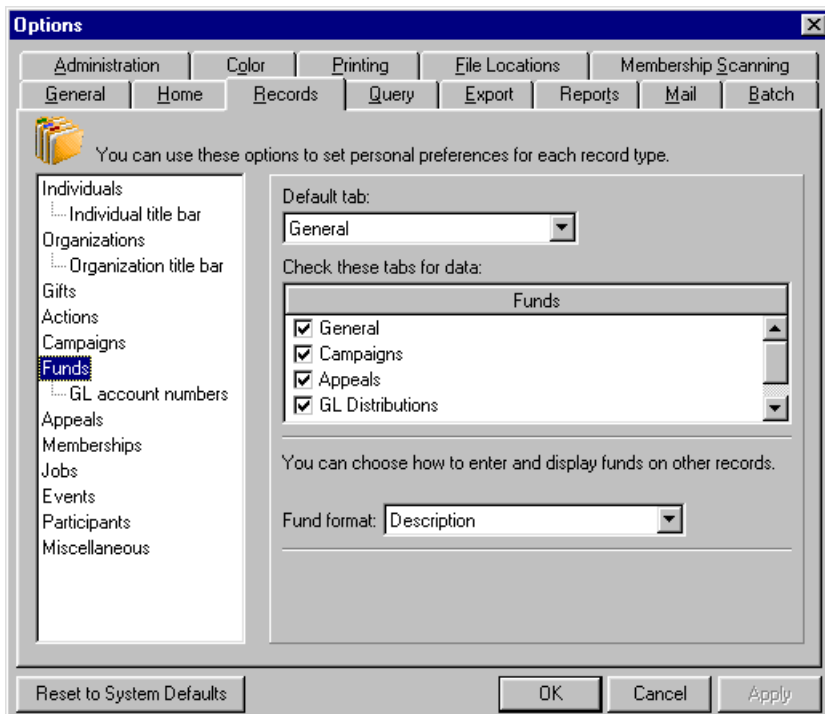
Types of User Options

User Options are grouped by tabs on the Options screen of **The Raiser's Edge**. Each tab contains options that apply to specific areas of the program.

General. On the General tab, you set various data entry and display preferences. For example, you can select which page first appears when you log into the program and whether you want to see a short description of a toolbar button function whenever you pass the mouse over the button.

Home. On the Home tab, you select which functions and records are accessible directly from your Home page in **The Raiser's Edge**. For example, if you frequently enter gifts, you can set an option allowing you to do so directly from your Home page, or you can elect to open a specific record, such as your General Fund, from your Home page.

Records. On the Records tab, you set defaults for whether records display by ID or description; what tab first appears when you open a record; and which are checked for data. For example, if you frequently add notes to constituent records, you can specify that those records always open directly to the Notes tab. When you specify that tabs be checked for data, any tab containing data appears with a red check mark beside the title. This enables you to quickly and easily check the status of an entire record without clicking each tab individually.

Query. On the Query tab, you set general preferences such as a default query type and format, advanced preferences such as whether or not you want to include deceased or inactive constituents when queries are processed, and specify whether code tables display by long or short description on queries.

Export. On the Export tab, you select general defaults such as an export type and format and whether you want to save the settings for each export.

Reports. On the Reports tab, you set options for all reports such as a default font and size, and preferences for which gifts appear in reports.

Mail. On the Mail tab, you select a default font and size for all mailings and select gift preferences for your mailings.

Batch. On the Batch tab, you set constituent name formats, defaults for automatically saving batches, and other batch functions.

Administration. On the Administration tab, you specify whether or not you want to save parameters each time you close a global change or import. Parameters refer to filters you use to specify what information is included in a global change or import. By automatically naming and saving a global change or import each time you perform one, you can save time and effort by reusing already created parameters instead of starting from scratch each time. On this tab, you can also specify settings for *RE:Queue for Task Scheduling*.

Color. On the Color tab, you personalize **The Raiser's Edge** by specifying the colors in which you want to display calendar entries, legends, locked cells in grids, and various types of text throughout the program.

Printing. On the Printing tab, you select saved files to default when printing, previewing, or exporting reports and mailings from a record type. If you already have a set of parameters for certain mailings and reports, specifying them as defaults saves time when exporting or printing.

File Locations. On the File Locations tab, you specify data paths to other programs, such as a word processor, you use in conjunction with **The Raiser's Edge**. By specifying data paths from this central location, you can save time by avoiding having to do so each time you use your word processor or any other program linked to **The Raiser's Edge**.

Membership Scanning. On the Membership Scanning tab, you specify various settings for the *Membership Scanning*. You can specify colors and sounds to use when scanning membership cards and create a variety of other default settings.

General Options

General options establish settings such as the page you first see when you log into *The Raiser's Edge*, data entry defaults, and whether you want to display graphics on the Raiser's Edge bar and in the background of certain pages.

▶ **Setting General options**

Note: You can also access **User Options** when you have a record open by selecting **Tools**, **User Options** from the menu bar. The type of record you have open determines which tab displays. For example, if you are in a campaign, User Options opens on the Records tab with **Campaigns** selected in the tree view.

You can set General options from the General tab of the Options screen.

1. From the shell menu bar, select **Tools**, **User Options**. The Options screen appears, defaulting to the General tab.
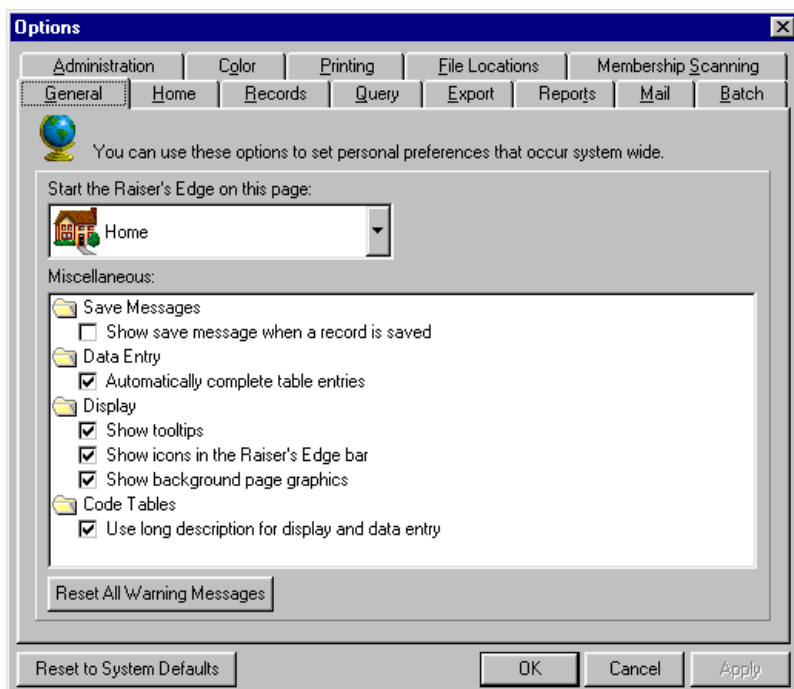
2. In the **Start the Raiser's Edge on this page** field, select the page you want to appear when you log into the program. Click the down arrow to view the available entries. The default entry is **Home**. Select the page that works best for you. For example, you may want to open on the Reports page if you frequently run reports when you first log into the program.

3. In the **Miscellaneous** box, when you mark the **Show save message when a record is saved** checkbox, a message appears when you save a record. For example, when you save a constituent record, the following message appears.
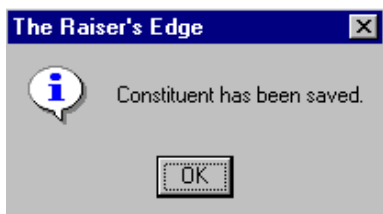
This can be useful if you want verification when you save records. If the checkbox is unmarked, no message appears when you save a record.

4. Leave the **Automatically complete table entries** checkbox marked if you want the **The Raiser's Edge** to fill in the rest of an entry after you enter one or two characters in a field with a table. For example, if you enter "s" in the **State** field, the program fills in the rest of the first table entry that begins with s: South Carolina. You can override the entry by continuing to type. We recommend marking this checkbox to help speed your data entry.

5. When you mark the **Show tooltips** checkbox in the **Display** folder, as you hover your mouse cursor over a toolbar button, a short description of the function of the button appears under it. We recommend you leave this checkbox marked until you become familiar with the toolbar buttons and their functions.

6. If you want the Raiser's Edge bar to appear as text only, unmark the **Show icons in the Raiser's Edge Bar** checkbox.

7. If you do not want to see images in the background when you open a page such as Query or Configuration, unmark the **Show background page graphics** checkbox.

8. The entries for some tables (such as **Schools**) can be viewed by either a long or short description. In the **Code Tables** folder, mark the **Use long description for display and data entry** checkbox to view the long descriptions when you access a list of table entries. Unmark the checkbox if you want to view short descriptions. You may want to view long descriptions until you become familiar with the entries for your tables.

9. When you click **Reset All Warning Messages**, you turn on any warning messages you turned off by marking the **Do not display this message again** checkbox. Many warning messages appear with this checkbox. You can turn these messages off again individually as they appear in the program.

10. Click **Apply** to save and apply your changes and keep the Options screen open. Click **OK** to save your changes and exit the Options screen.

If you want to undo any changes you made and reestablish all program settings, click **Reset to System Defaults**. To exit User Options without saving your most recent changes, click **Cancel**.

Home Options

On the Home tab of User Options, you can personalize your Home page in **The Raiser's Edge**. You can create shortcuts for records and functions, so you can access them directly from your Home page, instead of through *Records*. For example, if you frequently add new constituents, you can do so directly from your Home page by marking a checkbox here. You can also open specific records by making them your favorites. When you have a record open, select **Favorites**, **Add to Favorites** to make that record a favorite. Once you select records as favorites, you can use arrow buttons in User Options to specify that your favorites list in a specified order on your Home page, where you can open them directly. For more information about personalizing the Home page, see "The Raiser's Edge Home Page" on page 36.

▶ **Setting Home options**

On the Home tab of the Options screen, specify which records and functions you want to appear on your Home page of the shell of **The Raiser's Edge 7**.

Note: From the Home page, you can access the Home options by clicking **Customize User Options** on the Home page action bar.

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Home tab.
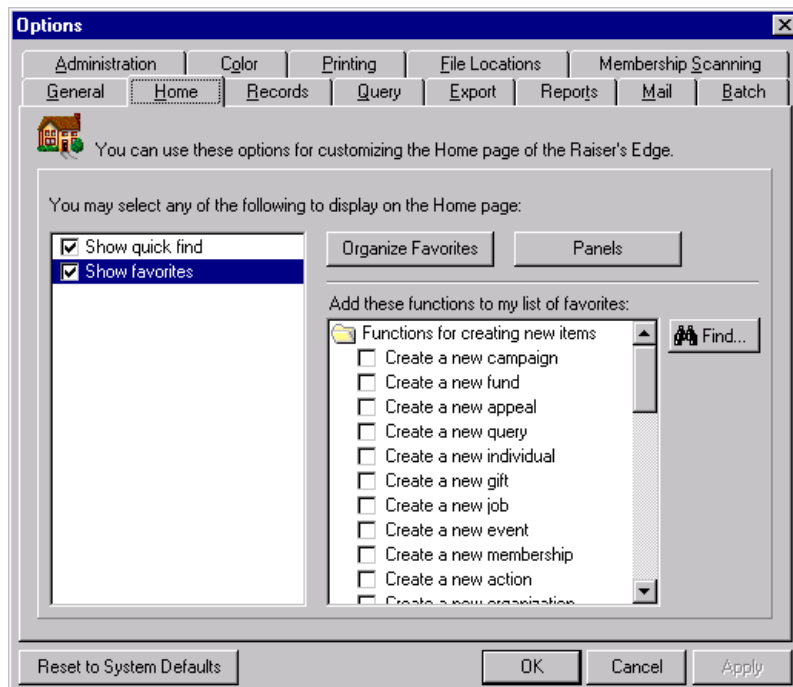
3. Under **You may select any of the following to display on the Home page**, you can add the constituent search **Quick Find** field by marking the **Show quick find** checkbox. This allows you to search for a constituent directly from the Home page.

4. Also under **You may select any of the following to display on the Home page**, you can select shortcuts for frequently used functions to appear on your Home page.

Note: When you save a favorite from a page in *The Raiser's Edge*, the favorite lists on the Organize Favorites screen. For example, if you add Mark Adamson's record as a favorite from the Records page, you see his record listed on the Organize Favorites screen. To do this, open the specific record or task you want from the Raiser's Edge page. When the record or task is open, select **Favorites**, **Add to Favorites** from the shell menu bar.

When you mark the **Show favorites** checkbox, the other items on the screen are enabled. When you click the **Organize Favorites** button, the Organize Favorites screen appears so you can create new favorite folders and set the order in which your favorites appear on your Home page.

Note: You can quickly access the Organize Favorites screen from the Home page. To do this, right-click in the **Favorites** frame. A menu appears. From the menu, select **Organize Favorites**.

Select an entry or folder and use the arrows in the action bar to adjust the order in which the entry appears on your Home page. You can also use the arrows to make an entry a subentry or subfolder of another entry.

On the action bar, you can click buttons to **Edit** or **Delete** a selected entry or folder, or **Copy** the contents of an entry to a new entry. When you select **New Folder**, the New Folder screen appears.
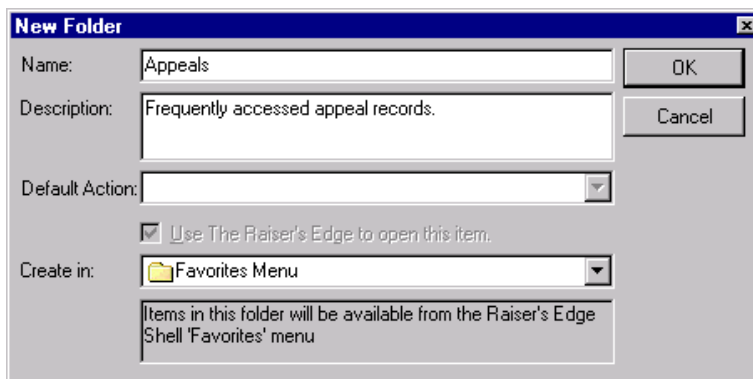
Enter a **Name** and **Description** for your new folder. In the **Create in** field, select the entry under which your new folder will appear. If you select "Favorites Menu", the new folder appears directly on your Home page. To save your new entry and return to the Organize Favorites screen, click **OK**.

When adding a new field, the **Default Action** field is disabled.

Note: If you choose to open a document within *The Raiser's Edge* by marking the **Use The Raiser's Edge to open this item** checkbox, you cannot edit the document.

> The **Use The Raiser's Edge to open this item** checkbox only enables when you are adding an external document to the Home page. If you are adding an external document, such as a *Crystal Report* or Microsoft *Word* document, mark this checkbox so the document opens within the Raiser's Edge shell. If you want the document to open separately, do not mark this checkbox. For more information about adding external documents to the Home page, see "Adding an external document to the Home page" on page 45.

> In the **Create in** field, you can save the folder directly on the Home page by selecting "Favorites menu". Click the down arrow to save the new folder within an existing one.

> To save and close the new folder, click **OK**. You return to the Organize Favorites screen.
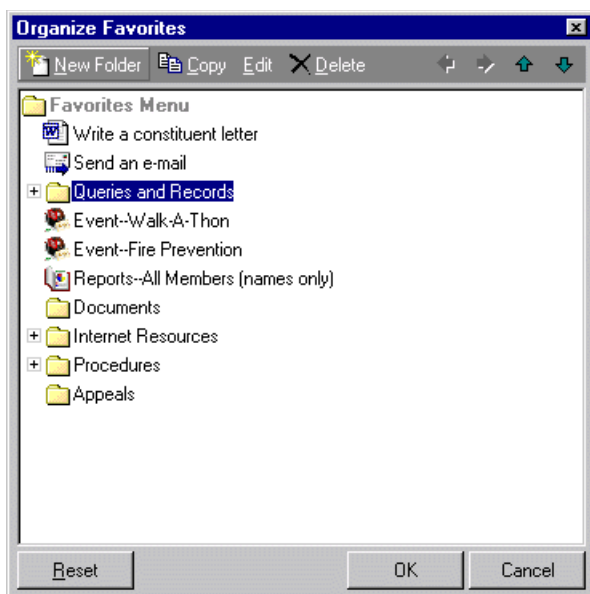
Note: To rename a favorite, highlight the folder or task on the Organize Favorites screen. Click **Edit**. The Edit Favorite screen appears. Enter the new name in the **Name** field. To save the new name, click **OK**.

> If you want to remove all items you have added and keep only those default items that came with the program, click **Reset**. A message appears verifying that you want to remove all the items you created. To delete the favorites you defined, click **Yes**.

> To close the Organize Favorites screen and return to the Home tab of User Options, click **OK**.

Note: The available functions in the folders vary according to the optional modules you have. For example, if you have the optional module *Event Management*, a checkbox is available in the **Functions for creating new items** folder so you can **Create a new event**. Unless you have the optional module *Event Management*, this checkbox is not visible.

5. On the Home tab, the **Functions for creating new items** folder contains all options for creating new records. Mark a checkbox and the corresponding function is enabled from your Home page. For example, if you frequently create new funds, you can mark a checkbox so you can save time by doing so directly from your Home page, rather than going through *Records*.
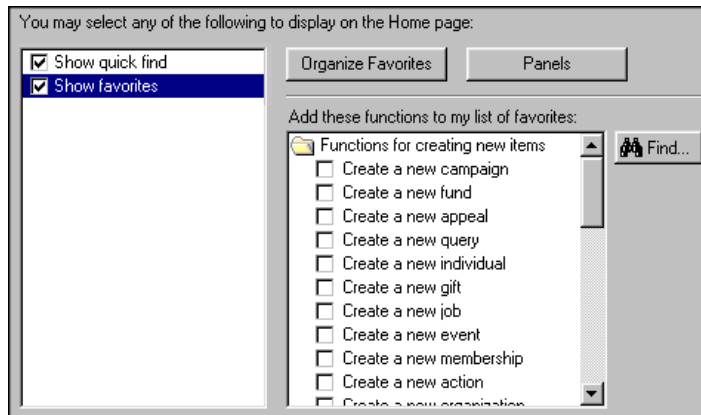
When you select multiple items to display on your Home page, they always appear in the order in which they list in the box. For example, when you mark the **Create a new appeal** and **Create a new campaign** checkboxes, the create a new campaign function appears first on your Home page because it lists first in the box.

Tip: Function shortcuts give you the ability to create or open record types from your Home page. Favorites let you open specific records from your Home page.

6. The **Functions for opening items** folder contains checkboxes for accessing the Open screens for each record type. When you double-click the folder, it opens and a list of checkboxes appears. Mark a checkbox and the corresponding function is enabled from your Home page. For example, if you frequently edit actions assigned to solicitors, you can mark a checkbox to save time by accessing the Open screen for actions directly from your Home page, rather than going through *Records*, **Actions**.

7. The **Internet Resources** folder contains checkboxes for accessing information that can help you use *The Raiser's Edge*. For example, you can include links to the Blackbaud Web site and Knowledgebase on your Home page.

When you click **Find**, the Find screen appears. You can use the Find screen to locate a particular checkbox in the **Add these functions to my list of favorites** box instead of scrolling through the entries.

Note: The Dashboard panels you choose to display on your Home page are separate from the panels you choose to display on the Dashboard page. For example, if you display the Donor Giving Analysis on the Dashboard page, it does not appear on your Home page. To display the panel on your Home page, you must create it from the Home tab of the Options screen in User Options.

8. You can include Dashboard panels on your Home page. Click **Panels**. The Options screen for panels appears.
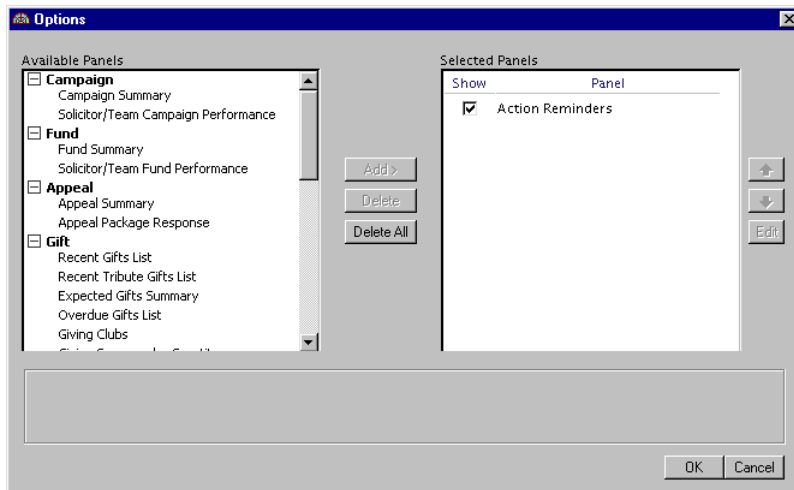
9. To include a Dashboard panel on your Home page, select the panel in the **Additional Panels** box and click **Add** to include it in the **Selected Panels** box. All items in the **Selected Panels** box appear on your Home page.

    Use the arrow buttons to specify the order in which the **Selected Panels** display on your Home page. If you want to remove an item from the **Selected Panels** box, select it and click **Delete**. Click **Delete All** to remove all items from the **Selected Panels** box. To make changes to a selected panel, highlight it and click **Edit**. For information about editing *Dashboard* panels, see the *Dashboard Guide*.

    To return to the Home tab, click **OK**.

Note: If you have the optional module *VBA*, you can include a link to it by checking the **VBA** checkbox in the **Miscellaneous Functions** folder. You can include links to your VBA macros by adding the **VBA Macros** folder to your Home page.

10. The **Miscellaneous Functions** folder contains checkboxes for VBA, sending an individual email, or sending a constituent letter. For more information about sending an email or letter, see "Sending an email to a constituent" on page 43.

11. To save and apply your changes and keep the Options screen open, click **Apply**. To save your changes and exit the Options screen, click **OK**.

    If you want to undo any changes you made and reestablish all program settings, click **Reset to System Defaults**. To exit User Options without saving your most recent changes, click **Cancel**.

Records Options

You can set defaults for a wide variety of record displays, including which tab appears when you open a record and how names appear in the title bar at the top of a screen.

Individuals

Use record options to determine which tab first displays and which tabs are searched for data when you open an individual constituent record. You can determine how individual constituent names display on other records and you can choose to show constituent codes or, if you have the optional module *Membership Management*, memberships on the Bio 1 tab of the constituent record.

▶ **Setting record options for individuals**

You set all record options on the Records tab of the Options screen.

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Records tab.
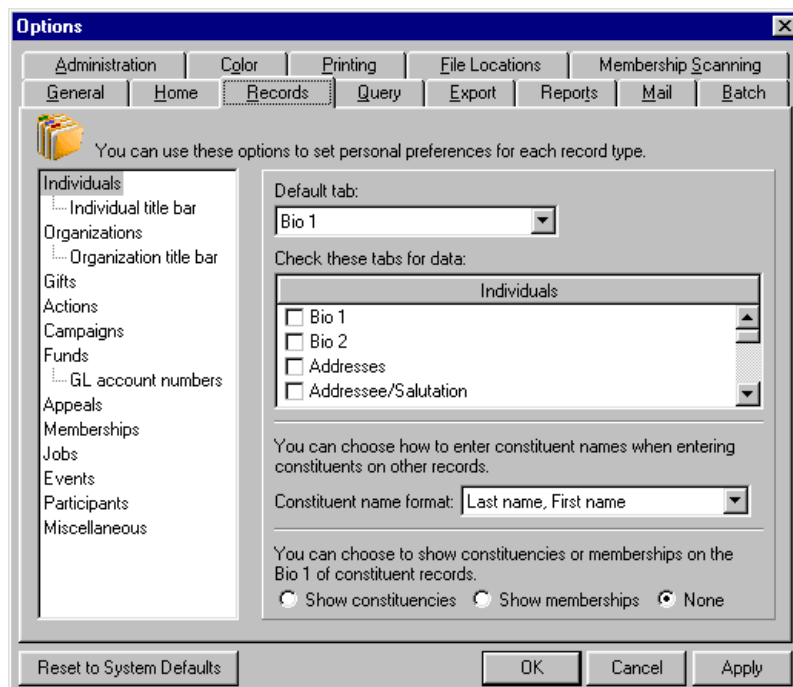
3. The tree view on the left lists all record types. You can select your display and data entry preferences for each record type. When you select a type from the tree view, the options for that type appear on the right. If a record has branches, they also list in the tree view. For example, with individual constituents you can set options for individuals in general or, using the **Individual Title Bar** branch, you can determine how individual constituent names display in the title bar at the top of record screens. Select a branch to view the options for the branch on the right.

Note: The tabs that list are determined by your security rights. If you do not have view rights to a particular tab, it does not appear as a possible entry. The list of tabs also changes according to the optional modules and other Blackbaud programs you have.

4. When you select **Individuals**, you can decide which **Default tab** you want to appear when you open a record. For example, if you enter many gifts, you can specify that constituent records always open to the Gifts tab. Click the down arrow to view a list of possible entries.

5. In the **Individuals** box, mark checkboxes to indicate the tabs you want the program to check for data when you open a record. A red check mark appears on a tab if it contains data. Marking this checkbox enables you to quickly identify which tabs already contain data when you open a record, instead of clicking each tab individually. When you right-click in the **Individuals** box, you can mark checkboxes to **Deselect All** or **Select All** the available tabs.

6. In the **Constituent name format** field, select a default format for entering constituent names on other records, such as when you enter constituents as solicitors. Click the down arrow to view a list of possible entries. Your selection is only a default and you can use the other options on individual records. You can also choose to display constituents by ID.

7. You can mark options to determine whether or not to show constituent codes or memberships (if you have the optional module *Membership Management*) in the bottom left corner of the Bio 1 tab. You can **Show constituent codes**, **Show memberships**, or show **None**. If you frequently select the Bio 2 and Membership tabs to check this information, you may want to include it on the Bio 1 tab to save time.

8. To determine how constituent names appear at the top of record screens, select **Individual title bar** in the tree view. If **Individual title bar** is not visible, double-click **Individuals** and **Individual title bar** appears as a branch in the tree view.

Note: The title bar appears at the top of a record screen.

9. Select a format in the **You can choose how to display constituent names on the record title bar for individuals** field. Click the down arrow to list the possible entries.

10. If you select "Use addressee from Individual", you can choose an addressee from the individual record. Specify your entry in the **Use this addressee if present on the Individual** field. You must also specify an entry in the **Otherwise use** field to use as a backup in case the program cannot find the first addressee format you specify. If the program cannot find either addressee, it uses Title 1, First name, Middle name, Last name, and Suffix 1.

Note: An embedded addressee/salutation lets you define the addressee/salutation each time you use it.

11. If you select "Use addressee from Configuration", you can select any defined addressee or an embedded addressee as your entry in the **Use addressee from Configuration** field. If you select an embedded addressee (Const Addr/Sal), the **Use this addressee if present on the Individual** and **Otherwise use** fields appear and you must specify entries in them as in step 9. For more information on embedded addressees, see the "Addressee/Salutations" section in the "Configuration" chapter of the *Configuration & Security Guide*.

12. Click **Apply** to save your selections and proceed to the next record in the tree view, or click **OK** to save your settings and exit User Options.

Organizations

You can select defaults for how organization names display at the top of record screens and on reports.

▶ **Setting record options for organizations**

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.
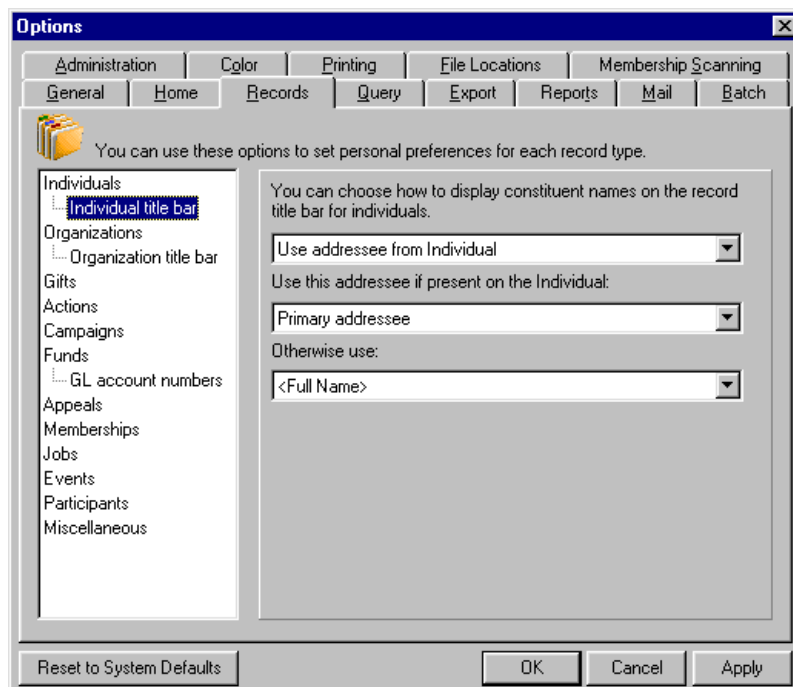
2. Select the Records tab.

3. In the **Records** tree view on the left, select **Organizations**.

4. Select the **Default tab** you want to appear when you open a record. For example, if you enter many gifts, you can specify that organization constituent records always open to the Gifts tab. Click the down arrow to view a list of possible entries.

5. In the **Organizations** box, mark checkboxes to indicate the tabs you want the program to check for data when you open a record. A red check mark appears on a tab if it contains data. Marking this checkbox enables you to quickly identify which tabs already contain data when you open a record, instead of clicking each tab individually.

6. You can mark options to determine whether or not to show constituent codes or memberships (if you have the optional module *Membership Management*) in the bottom left corner of the Org 1 tab. You can **Show constituent codes**, **Show memberships**, or show **None**. If you frequently click the Org 2 and Membership tabs to check this information, you may want to include it on the Org 1 tab to save time.

7. From the tree view, select **Organization title bar** in the tree view. If **Organization title bar** is not visible, double-click **Organizations** and it appears. The options for displaying organization names on the title bar and reports appear on the right.
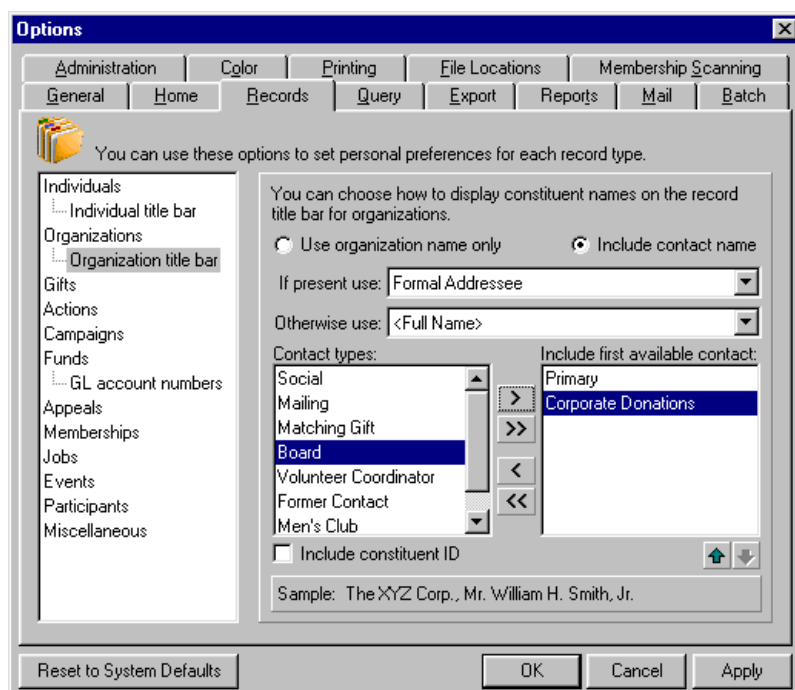
Note: Contacts can be constituents, solicitors, or honor/memorials.

8. The **Use organization name only** option defaults to marked. If you mark the **Include contact name** option, the **If present use** field is enabled for you to select a format for the contact name to appear with the organization name in the record title bar and on reports.

9. Name is the default for the **If present use** field. Click the down arrow to view the other possible entries. If you select any entry other than Name, the **Otherwise use** field is enabled with the default entry of Name. If the program is unable to find your selection in either field, it displays the name as it is entered on the contact record.

10. The **Contact Types** box lists all contact types. Use the arrows to move the types you want the program to check into the **Include First Available Contact** box. The program checks these types to locate a contact to display on the record title bar. You can use the up and down arrows to adjust the order in which the contact types list. Contacts are checked in the order in which you place them in the box. For example, if you move Business contact and Primary contact into the **Include First Available Contact** box and Business contact is on top, the program uses the first Business contact it finds. If it cannot find a Business contact, it uses the Primary contact.

11. If you mark the **Include Constituent ID** checkbox, the ID appears with the organization name in the title bar.

12. The **Sample** display shows how the name format you selected appears on the title bar.

13. Click **Apply** to save your selections and proceed to the next record in the tree view, or click **OK** to save your settings and exit User Options.

Gifts

You can set Gift options for the **Default tab** and **Check these tabs for data** the same way as those for Individuals. See "Setting record options for individuals" on page 94.

Actions

You can set Action options for the **Default tab** and **Check these tabs for data** the same way as those for Individuals. See "Setting record options for individuals" on page 94.

Additionally, you can mark the **Prompt for follow up** checkbox so a message automatically appears asking if you want to add a follow up action whenever you flag an action as completed and close the record. The message contains a **Do not ask me again** checkbox. If you mark this checkbox on the message, the **Prompt for follow up** checkbox is automatically unmarked in User Options.

Campaigns

You can set Campaign options for the **Default tab** and **Check these tabs for data** the same way as those for Individuals. See "Setting record options for individuals" on page 94. Additionally, you can choose how to enter and display campaigns on other records by selecting either Description or Campaign ID in the **Campaign format** field.

Funds

You can set Fund options for the **Default tab** and **Check these tabs for data** the same way as those for Individuals. See "Setting record options for individuals" on page 94. As with campaigns, you can choose how to enter and display funds on other records by selecting either Description or Fund ID in the **Fund format** field. Additionally, if you have Blackbaud's *General Ledger*, you can determine how *General Ledger* account numbers display in *The Raiser's Edge*.

‣ **Establishing preferences for General Ledger account numbers**

This option is available if you have Blackbaud's *General Ledger*. Mark an option to determine how *General Ledger* account numbers display throughout *The Raiser's Edge*.

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Records tab.

3. Select **GL Account Numbers** from the tree view on the left. The *General Ledger* account options appear on the right. If **GL Account Numbers** is not visible in the tree view and you have *General Ledger*, double-click **Funds** and **GL Account Numbers** appears as a branch in the tree view.
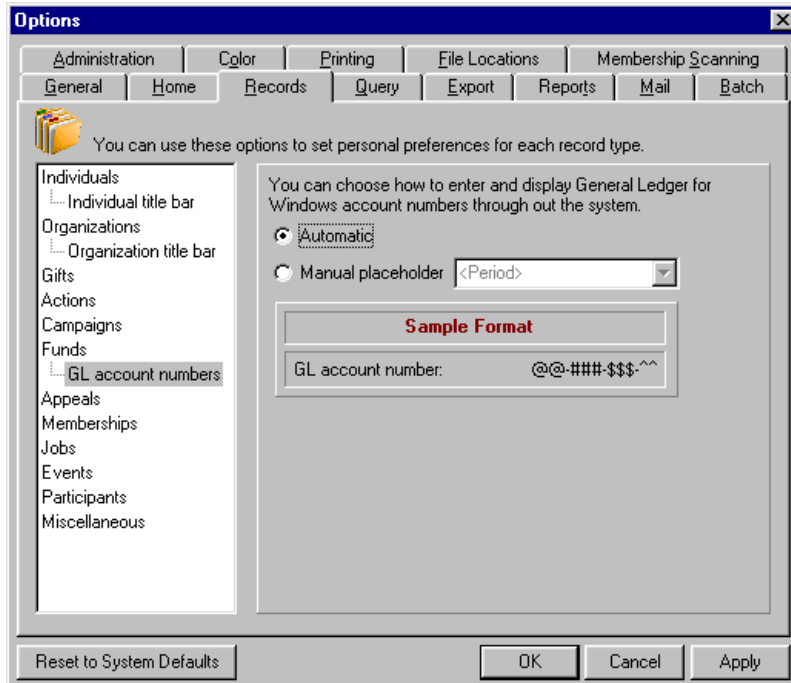
4. If you mark **Automatic**, the program uses predefined characters to take the place of any missing numbers in a *General Ledger* account number. If you have not filled in all digits in a debit or credit *General Ledger* account number on a fund record, placeholders appear in place of the missing digits.

Note: The format and number of digits in a validated *General Ledger* account number is always the same. When you enter an account number, a placeholder appears in place of any missing digits to let you know the account number is incomplete.

5. If you mark **Manual placeholder**, you can select a character in the corresponding field to appear if a debit or credit account number is not complete. The **Sample Format** display shows how a number looks with your choice of placeholder.

6. Click **Apply** to save your selections and proceed to the next record in the tree view, or click **OK** to save your settings and exit User Options.

Appeals

You can set Appeal options for the **Default tab** and **Check these tabs for data** the same way as those for Individuals. See "Setting record options for individuals" on page 94. Additionally, you can select how to enter and display appeals on other records by selecting either Description or Appeal ID in the **Appeal format** field.

Memberships

If you have the optional module *Membership Management*, these settings are available. You can set Membership options for the **Default tab** and **Check these tabs for data** the same way as those for Individuals. See "Setting record options for individuals" on page 94. Additionally, you can choose how to enter and display appeals on other records by selecting either Short or Long Description in the **Membership format** field.

A default gift for a membership is usually the cost of that membership. When you mark the **When adding default gift, load gift upon saving membership** checkbox, the gift record of the constituent the membership is being added to automatically opens when you save the membership. You can then add the default membership gift.

Jobs

If you have the optional module *Volunteer Management*, these settings are available. You can set Job options for the **Default tab** and **Check these tabs for data** the same way as those for Individuals. See "Setting record options for individuals" on page 94.
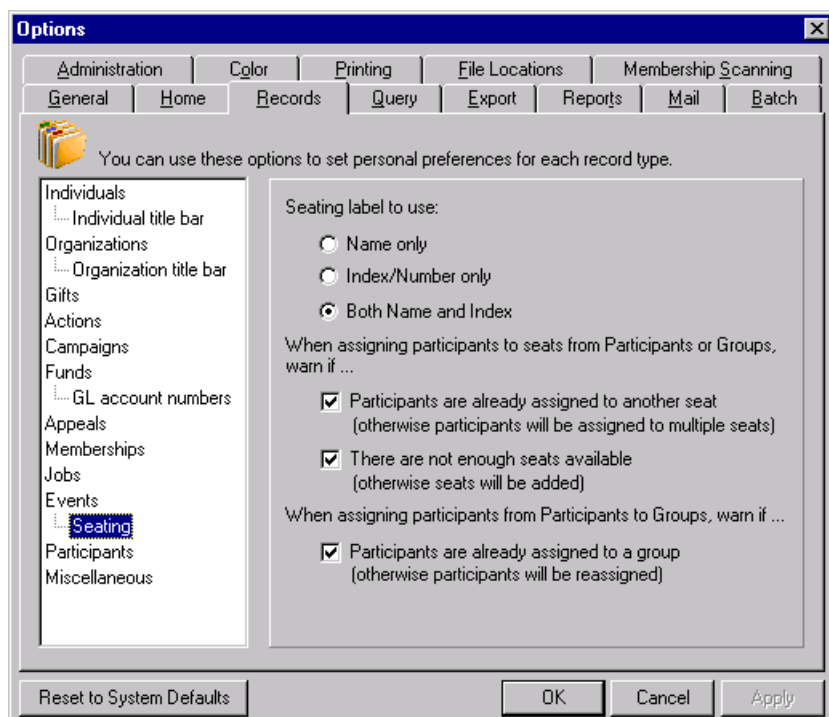
Events

If you have the optional module *Event Management*, these settings are available. You can set Event options for the **Default tab** and **Check these tabs for data** the same way as those for Individuals. See "Setting record options for individuals" on page 94. You can also choose how to enter and display events on other records by selecting either Event name or Event ID in the **Event format** field.

Additionally, you can specify settings to determine which seating label to use and warnings to appear when you assign participants to seats.

▶ **Establishing preferences for event seating**

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Records tab.

3. Select **Seating** from the tree view on the left. The event seating options appear on the right. If **Seating** is not visible in the tree view and you have *Events*, double-click **Events** and **Seating** appears as a branch in the tree view.

4. Select the Records tab.

5. From the tree view on the left, under **Events**, select **Seating**. The Event Seating user option selections appear on the right.

6. If, on the Seating screen, you want your seating arrangements in the **Seats** frame to show just the names of the sections, rows, tables, or seats; under **Selected label to use**, select **Name only**. If you want to see only a number, select **Index/Number only**. If you want to see a number and the name, select **Both Name and Index**.

7. When you assign participants from the **Participants** frame to their seats in the **Seats** frame or participant groups from the **Groups** frame to their seats in the **Seats** frame, the program can warn you if any of the participants have already been assigned to a seat. Under **When assigning participants to seats from Participants or Groups, warn if**, mark the **Participants are already assigned to another seat (otherwise participants will be assigned to multiple seats)** checkbox.

8. When you assign participants from the **Participants** frame to their seats in the **Seats** frame or participant groups from the **Groups** frame to their seats in the **Seats** frame, the program can warn you when there are not enough seats for your participant(s). Under **When assigning participants to seats from Participants or Groups, warn if**, mark the **There are not enough seats available (otherwise seats will be added)** checkbox.

9. When you assign participants from the **Participants** frame to a group in the **Groups** frame, the program can warn you when a participant has already been assigned to a group. Under **When assigning participants from Participants to Groups, warn if**, mark the **Participants are already assigned to a group (otherwise participants will be reassigned)** checkbox.

10. Click **Apply** to save your selections and proceed to the next record in the tree view, or click **OK** to save your settings and exit User Options.

Participants

If you have the optional module *Event Management*, these settings are available. You can set Participant options for the **Default tab** and **Check these tabs for data** the same way as those for Individuals. See "Setting record options for individuals" on page 94. Additionally, you can choose how to enter and display participants when you create a new participant for an event. In the **Participant name format** field, select either First name Last name or Last name, First name.
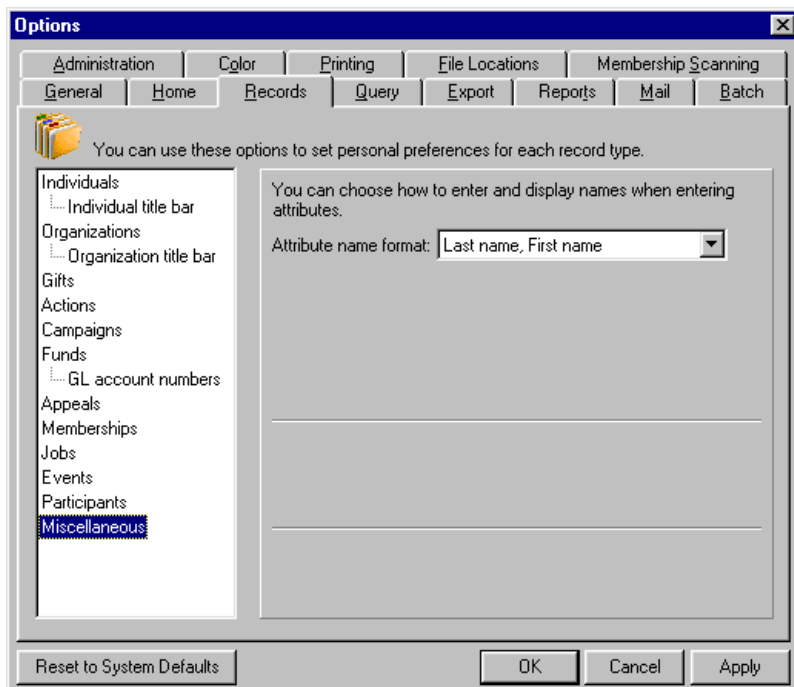
Miscellaneous

You can select how you want to display names when entering attributes by selecting a format in the **Attribute name format** field.

▶ **Selecting name display preferences for attributes**

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Records tab.

3. From the tree view, select **Miscellaneous**.

4. In the **Attribute name format** field, select how you want names to display when you enter attributes. You can also select to display constituent ID instead of a name. To learn more about making a constituent an attribute, see the Attributes section in the "Configuration" chapter of the *Configuration & Security Guide*.

5. Click **Apply** to save and apply your changes and keep the Options screen open. Click **OK** to save your changes and exit the Options screen.

   If you want to undo any changes you made and reestablish all program settings, click **Reset to System Defaults**. To exit User Options without saving your most recent changes, click **Cancel**.

Query Options

You can establish general, advanced, and code table default query settings. Use these options to set preferences for creating and running queries.

▸ **Setting General query options**

   All query options are located on the Query tab of the Options screen. Your selection in the list on the left determines which options display on the right.

   1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Query tab.
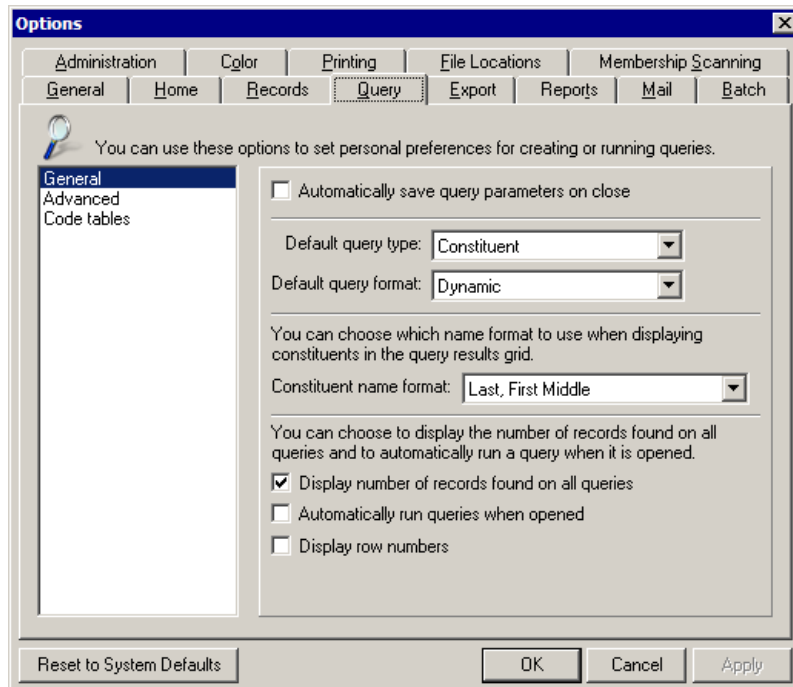
Note: Parameters refer to any field, option, or filter that narrows information used in a query. By naming and saving the query, you can reuse it or open and modify it and save it under a new name instead of starting anew.

3. The tab opens with **General** selected in the list on the left. You can mark a checkbox to **Automatically save query parameters on close**. If you have not saved a query before, when you close it (whether or not it has been run), the Save As screen appears so you can name and save the query. If you already saved the query, when you close it after making any changes, any new parameters are automatically saved without the Save As screen appearing. We recommend you mark this checkbox and always name and save your queries for future use.

4. Define a **Default query type** for new queries. If you create one type of query more often than others, entering it as your default can speed data entry. For example, if you run constituent queries more often than any other type, entering it as your default saves time when you create queries.

Note: We recommend you select Constituent as your **Default query type** and Dynamic as your **Default query format**. These are the most commonly used options. Constituent queries give you access to all fields in your database. Dynamic queries automatically update every time they are used.

5. Enter a **Default query format**. Select either "Dynamic" or "Static". If you want most of your queries to include new records each time you run them, select "Dynamic". If you want most of your queries to include only the records selected at the time you create the query, select "Static". For more information on dynamic and static queries see the "Query" section of the *Query & Export Guide*.

6. Select a **Constituent name format** to determine how constituents display in the query results grid. Click the down arrow to view a list of possible entries. The names in query results are alphabetized based on your selection here when you select **Sort Key** as a criteria field for a query.

7. In the **You can choose to display the number of records found on all queries and to automatically run a query when it is opened** frame, mark the **Display number of records found on all queries** checkbox if you want the number of records to automatically display on the Results tab. You may want to include this number as a quick reference when you run your queries.

8. If you want to save time by going directly to the Results tab when you open a query, you can mark the **Automatically run queries when opened** checkbox.

9. To display row numbers on the Results tab, mark the **Display row numbers** checkbox.

10. Click **Apply** to save your selections and keep User Options open, or click **OK** to save your settings and exit User Options.

▶ **Setting Advanced query options**

Advanced options include establishing criteria and sort field defaults.

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Query tab.

3. From the list on the left, select **Advanced**. The **Advanced** query options appear on the right.
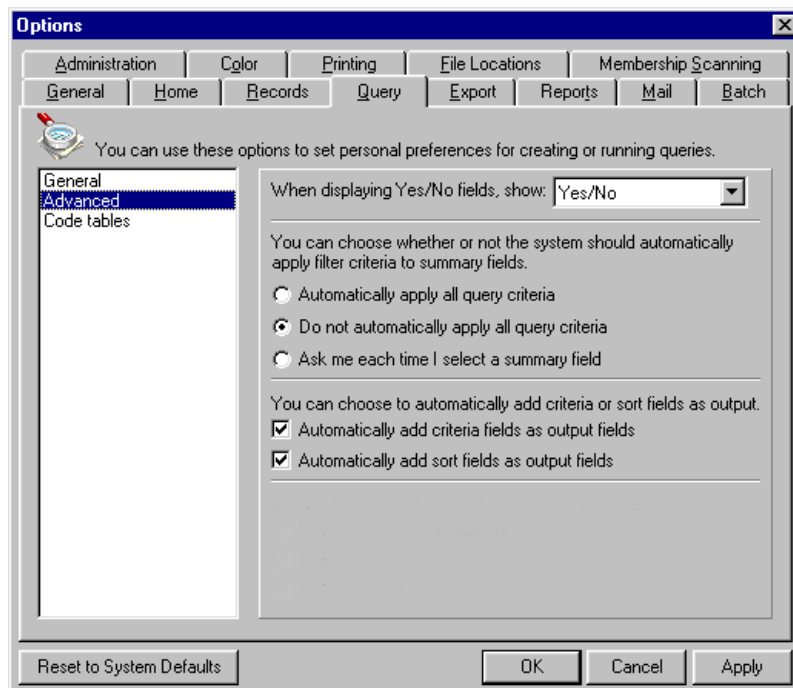
4. Use the **When displaying Yes/No fields, show** field to determine how values for fields that require an "either, or" entry display. The default is Yes/No, but you may want to use another variation such as True/False or Y/N. Click the down arrow to view a full list of possible entries for this field.

Note: Summary fields display sum values for fields. For example, **Total gifts**, **Total amount**, and **Total number of jobs** are summary fields.

5. In the **You can choose whether or not the system should automatically apply filter criteria to summary fields** frame, you can mark one of three options.

If you mark **Automatically apply all query criteria**, any field you select as criteria is automatically applied to any applicable summary field you choose. For example, you may filter constituents by gifts given to your Annual Fund. If you elect to automatically apply filters to summary fields, the total amount for a constituent includes only gifts given to this fund. If you do not automatically apply filters to summary fields, the total amount reflects all gifts given by a constituent. Automatically applying your criteria to all summary fields can save a great deal of time as opposed to specifying whether you want the criteria to apply each time you select a summary field.

If you mark **Do not automatically apply all query criteria**, when you select a summary field, you must specify if you want the filter fields you already selected to apply to the summary field.

If you mark **Ask me each time I select a summary field**, each time you select a summary field and at least one applicable criteria field is already selected, a message appears asking if you want to apply applicable criteria to the summary field. Click **Yes** to apply the criteria.

Tip: If you usually make your criteria or sort fields output for your queries, you can save time by marking a checkbox to automatically include them as output every time you run a query.

6. In the **You can choose to automatically add criteria or sort fields as output** frame, you can mark a checkbox to **Automatically add criteria fields as output fields**, so whenever you run a query, any fields you select as criteria also appear as output for the query. You can do the same with the fields you select to sort the query when you mark the **Automatically add sort fields as output fields** checkbox.

7. Click **Apply** to save your selections and keep User Options open, or click **OK** to save your settings and exit User Options.

▶ **Setting Code tables query options**

Note: A field with a down arrow to the right is a code table. You can display entries for some tables in either a short or long description. Once you become familiar with your entries, you may want to display the short entries to save time.

You can select how code tables, such as **State** and **Constituent code**, display and sort in queries.

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Query tab.

3. From the list on the left, select **Code tables**. The **Code tables** query options appear on the right.
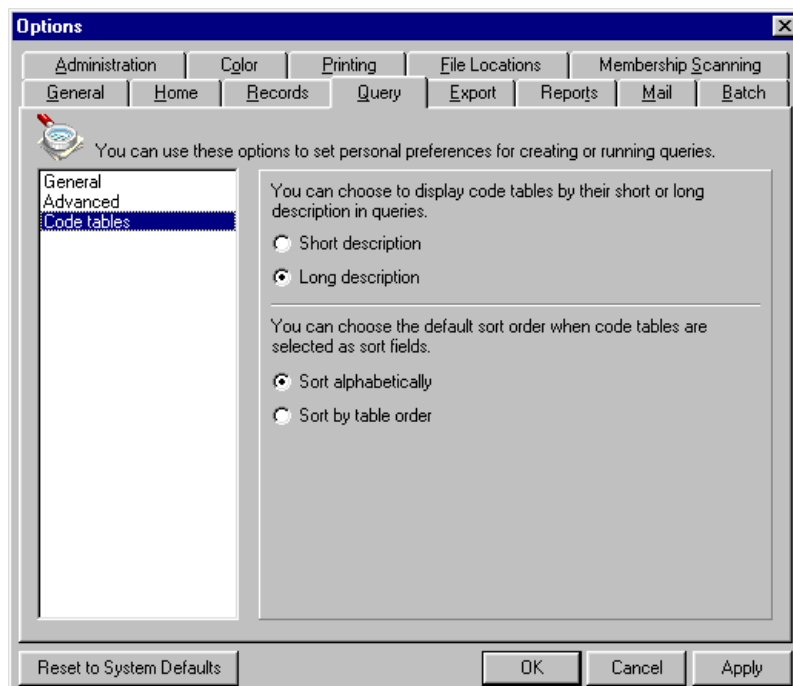
4. In the **You can choose to display code tables by their short or long description in queries** frame, you can mark an option to display the **Short description** or **Long description**.

5. In the **You can choose the default sort order when code tables are selected as sort fields** frame, you can mark an option to **Sort alphabetically** or **Sort by table order**.

6. Click **Apply** to save and apply your changes and keep the Options screen open. Click **OK** to save your changes and exit the Options screen. If you want to undo any changes you made and reestablish all program settings, click **Reset to System Defaults**. To exit User Options without saving your most recent changes, click **Cancel**.

Export Options

You can set a default export type and format, and establish other general defaults for creating and running exports.

▸ **Setting General export options**

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Export tab.
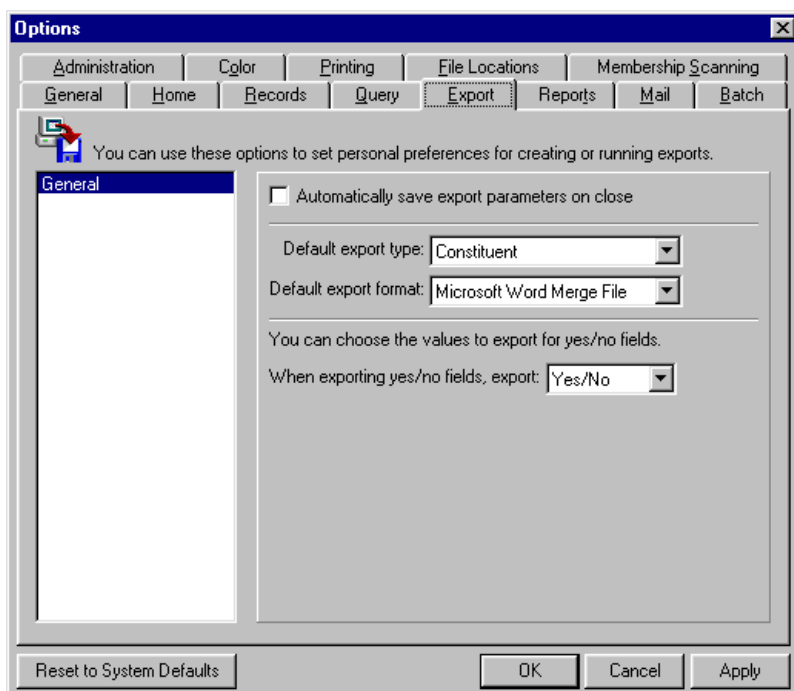
3. The Export tab opens with **General** selected in the box on the left. You can mark a checkbox to **Automatically save export parameters on close**. If you have not saved an export before, when you close it the Save As screen appears so you can name and save the export. If the export has already been saved, when you close it, the parameters are saved without the Save As screen appearing.

4. Define a **Default export type** and **Default export format** to use when when you create a new export. Click the down arrow to view a list of possible choices. These are just defaults; you can override them. If you create one type of export more than others, entering it as your default can speed data entry.

5. Use the **When exporting Yes/No fields, export** field to determine how values for fields that require an "either, or" entry display. The default is Yes/No, but you may want to use another variation such as True/False or Y/N. Click the down arrow to view a full list of possible entries for this field.

6. Click **Apply** to save and apply your changes and keep User Options open. Click **OK** to save your changes and exit User Options.

   If you want to undo any changes you made and reestablish all program settings, click **Reset to System Defaults**. To exit User Options without saving your most recent changes, click **Cancel**.
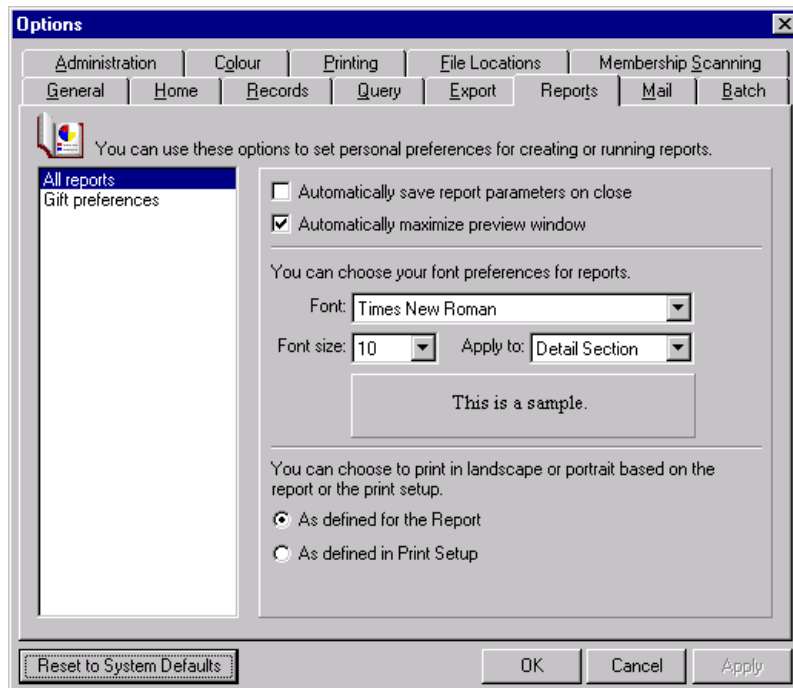
Reporting Options

You can set options for creating and running all reports and define your gift preferences for reports.

▶ **Setting all reports options**

You can set preferences for saving report parameters, fonts, font sizes, and report orientations.

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Reports tab.

3. The Reports tab opens with **All reports** selected in the list on the left. You can mark a checkbox to **Automatically save report parameters on close**, so that whenever you create a new report, the Save As screen appears so you can name and save it. We recommend you mark this checkbox and always name and save your reports so you can save time by reusing existing report parameters.

4. Mark the **Automatically maximize preview window** checkbox if you want print previews of reports to appear in the largest possible window.

5. In the **You can choose your font preferences for reports** frame, select a default **Font** and **Font size**. Decide how much of the report your font preferences should **Apply to** by selecting either the entire report or only the detail section. The **Sample** display shows an example of your font selections.

Note: Because of the large amount of information contained in some reports, not all reports allow you to specify a paper orientation.

6. In the **You can choose to print in landscape or portrait based on the report or the print setup** frame, determine how the program establishes paper orientation. Mark either **As defined for the Report** or **As defined in Print Setup**.

7. Click **Apply** to save your selections and keep User Options open, or click **OK** to save your settings and exit User Options.

▶ **Setting gift preferences for reports**

Specify how anonymous donors are processed in reports and which currency types display.

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Reports tab.

3. From the list on the left, select **Gift preferences**. The **Gift preferences** options for reports appear on the right.
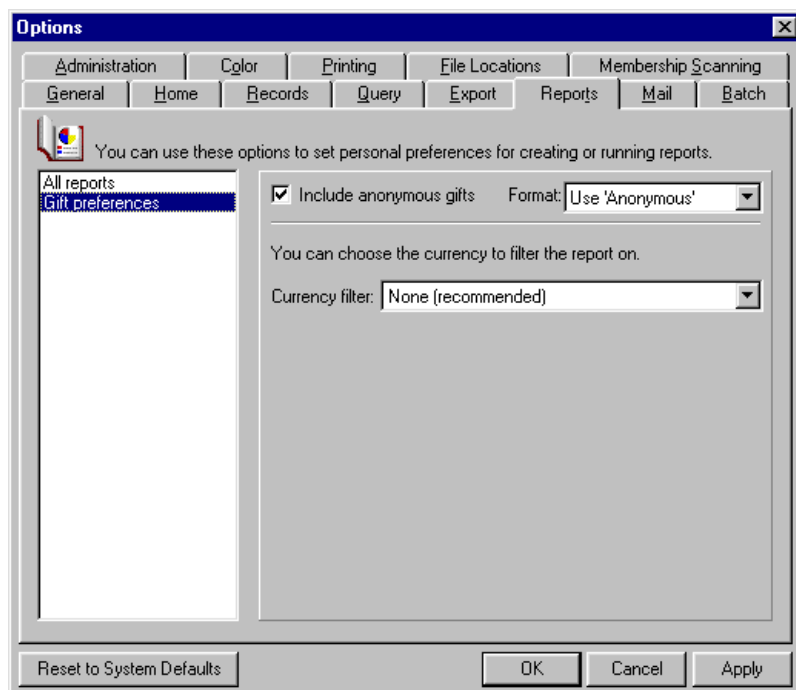
4. You can mark a checkbox if you want your reports to **Include anonymous gifts**. When you mark the checkbox, the **Format** field is enabled so you can specify how anonymous gifts appear on reports. You can select from: Asterisk at end of line, Use 'Anonymous', or Leave name intact.

Note: Currencies and exchange rates for different countries are established on the **International** link of *Configuration*.

5. In the **Currency filter** field, you can specify which gifts display based on currency. For example, if you select pounds as a currency filter, only gifts entered in pounds display. However, the display for these gifts is in dollars as established by the conversion rate for pounds entered in the **International** link of *Configuration*. We recommend you leave the default setting of "None."

Limiting your reports to a single currency type can affect the accuracy of your reports if you enter gifts in different currencies.

6. Click **Apply** to save and apply your changes and keep the Options screen open. Click **OK** to save your changes and exit the Options screen.

If you want to undo any changes you made and reestablish all program settings, click **Reset to System Defaults**. To exit User Options without saving your most recent changes, click **Cancel**.

Mail Options

You can set a variety of options for creating and running mailings. You can set options for all mailings and set your gift preferences for mailings.

▶ **Setting options for all mailings**

Set options for saving mailing parameters, default fonts, and font sizes for your mailings.

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Mail tab.
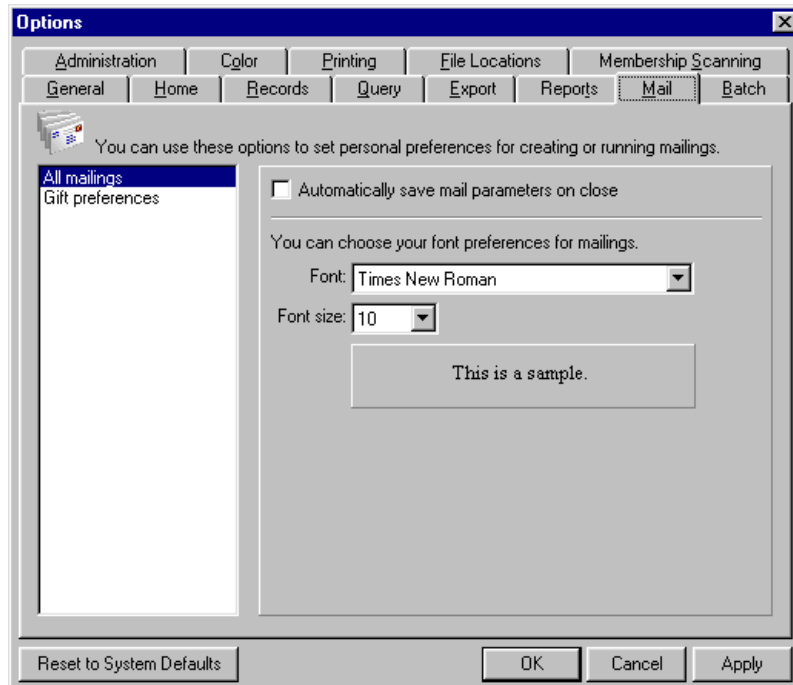
3. The Mail tab opens with **All mailings** selected in the list on the left. You can mark a checkbox to **Automatically save mail parameters on close**, so whenever you create a new mailing the Save As screen appears for you to name and save it. If you have previously saved the mailing, any changes are automatically saved when you close it without the Save As screen appearing. We recommend you mark this checkbox and always name and save your mailings so you can reuse them.

4. In the **You can choose your font preferences for mailings** frame, select a default **Font** and **Font size**. The **Sample** display shows an example of your font selections.

5. Click **Apply** to save your selections and keep User Options open, or click **OK** to save your settings and exit User Options.

▶ **Setting gift preferences for mailings**

You can specify how anonymous donors are processed in mailings and which currency types display.

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Mail tab.

3. From the list on the left, select **Gift preferences**. The **Gift preferences** mail options appear on the right.
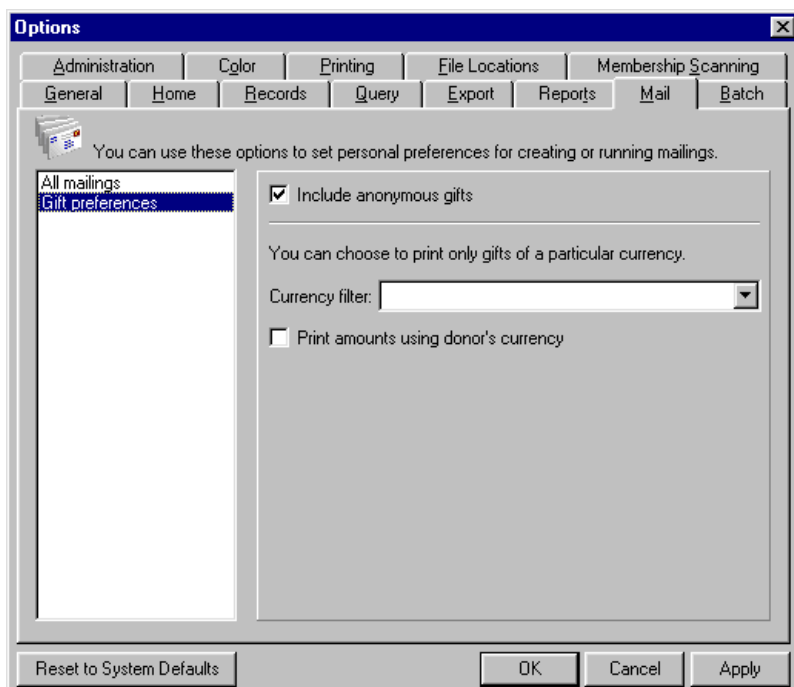
4. You can mark a checkbox if you want your mailings to **Include anonymous gifts**.

Note: Currencies and exchange rates for different countries are established from the **International** link of *Configuration*.

5. In the **Currency filter** field, you can specify which gifts display based on currency. For example, if you select pounds as a currency filter, only gifts entered in pounds display. However, the display for these gifts is in dollars as established by the conversion rate for pounds entered in the **International** link of *Configuration*.

   You do not have to make an entry in this field. Entering a single currency type here can affect the accuracy of your mailings if you enter gifts in different currencies.

6. If you do not enter a type in the **Currency filter** field, you can mark the **Print amounts using donor's currency** checkbox so that different types of currency donors use are printed in mailings.

7. Click **Apply** to save and apply your changes and keep the Options screen open. Click **OK** to save your changes and exit the Options screen.

   If you want to undo any changes you made and reestablish all program settings, click **Reset to System Defaults**. To exit User Options without saving your most recent changes, click **Cancel**.

Batch Options

Set constituent name formats, addressee/salutations, defaults for automatically saving, and other batch functions.

▶ **Setting general batch options**

   Select whether or not you want to automatically save batches when you close them and how often to auto-save batches.

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Batch tab.
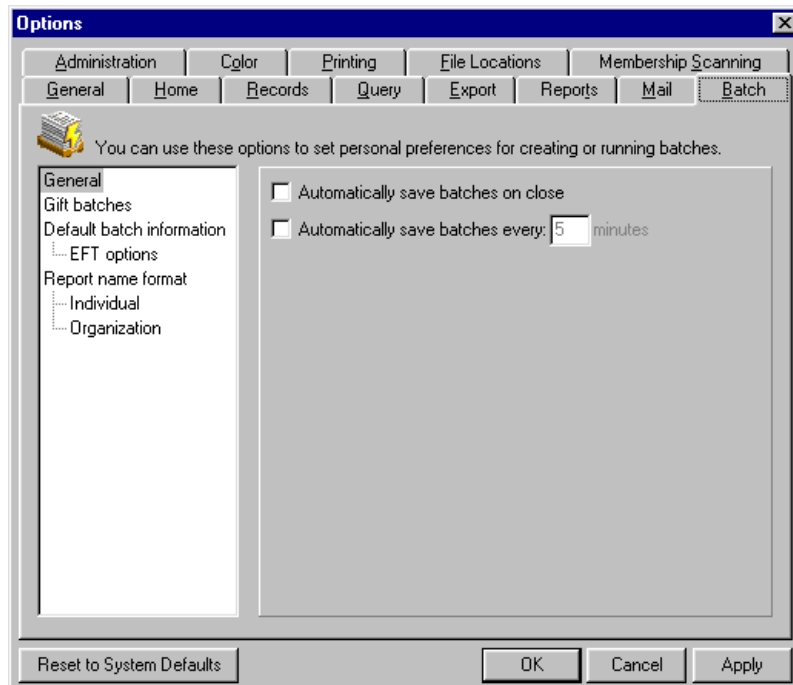
3. The Batch tab opens with **General** selected in the tree view. Mark a checkbox if you want to **Automatically save batches on close**. If you leave the checkbox unmarked, the program asks you if you want to save any changes each time you close a batch. We recommend you mark this checkbox so your batch header and data are automatically saved whenever you close out of the header or data entry grid.

4. Mark a checkbox to **Automatically save batches every [ ] minutes**. Enter the number of minutes between auto-saves. We recommend you save your batches at least every five minutes.

5. Under **You can choose which name format you are using when entering constituents in gift batch or time sheet batch**, in the **Constituent name format** field, select the format for the constituent names you enter in a gift or time sheet batch. For example, you can select "First name Last name" to have the first name appear before the last name for a constituent. Time sheet batches are available if you have the optional module *Volunteer Management*.

6. Under **When saving information entered in the constituent window**, mark the **Always ask before saving** checkbox if you want the program to display a message before it updates the database with information entered in the constituent window.

7. Click **Apply** to save your selections and keep User Options open, or click **OK** to save your settings and exit User Options.

▶ **Setting gift batch options**

Set options to determine how constituent names are formatted for those giving gifts included in your batch, how to save information entered into the constituent window of the batch screen, and how to handle pledges and gifts entered in your batches using bar codes.

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Batch tab.

3. From the tree view on the left, select **Gift batches**. The **Gift batches** options appear on the right.
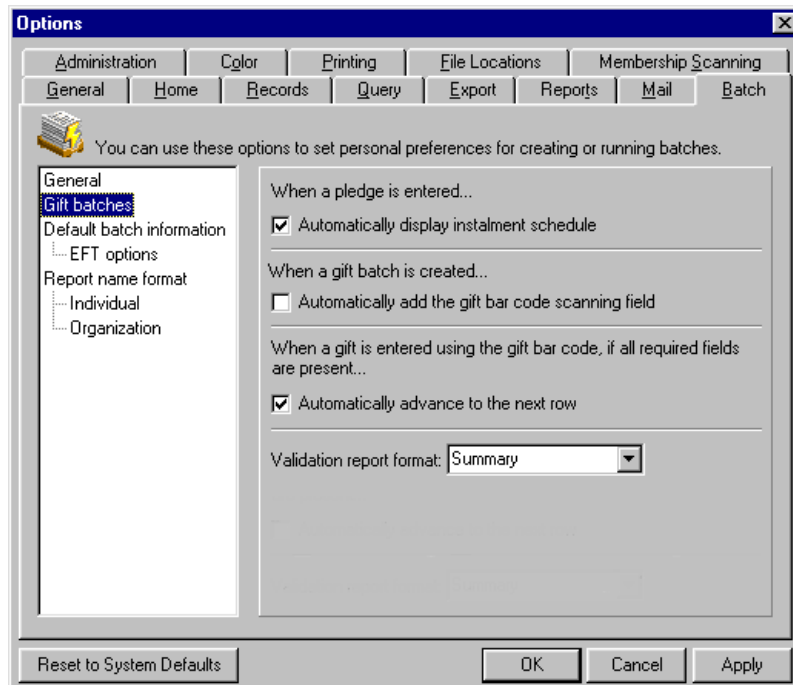
4. In the **When a pledge is entered** frame, you can mark a checkbox to **Automatically display the installment schedule** the first time you leave a row that has an installment schedule. This occurs only the first time you visit and leave the row. If you frequently check the schedule when entering pledges, mark this checkbox to save time by doing so automatically.

5. In the **When a gift batch is created** frame, mark the checkbox to indicate if the cursor should **Automatically advance to the next row** of the Gift grid. For this to occur, all required gift fields must be present (not all batch fields). This can also save data entry time.

6. In the **Validation report format** field, select either "Summary" or "Detail" as the default format for your validation reports. This is only a default, you can change it when you run the report.

7. Click **Apply** to save your selections and keep User Options open, or click **OK** to save your settings and exit User Options.

▶ **Setting default batch information**

You can display a default row in the data entry grid, and select how to access defaults when entering information in a batch. You can set defaults for electronic fund transfers.

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Batch tab.

3. From the tree view on the left, select **Default batch information**. The **Default batch information** options appear on the right.
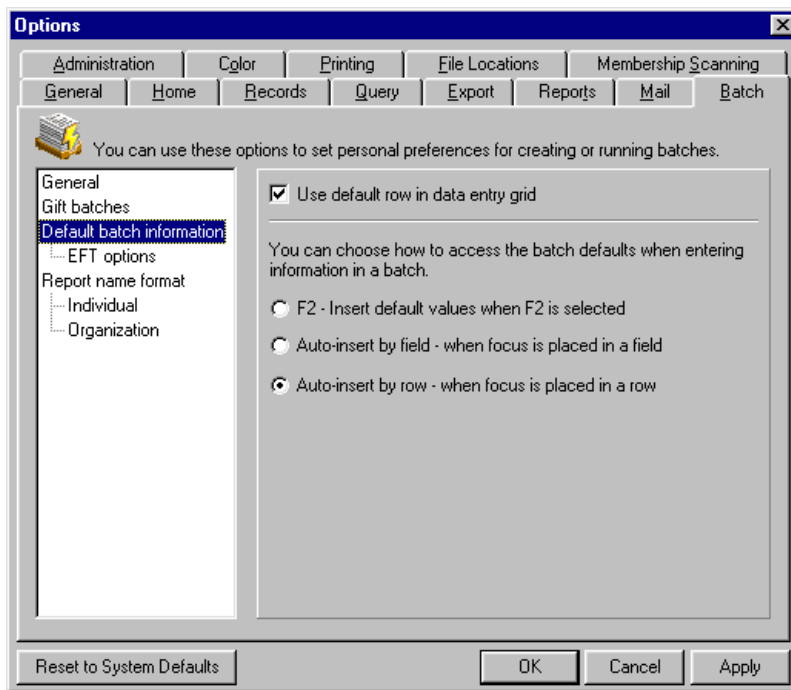
Note: Defaults are set on the Defaults tab of the Batch Setup screen. If necessary, you can change the defaults in the row as you enter data. Any changes you make to the row are automatically made to the Defaults tab as well.

4. When you mark the **Use default row in data entry grid** checkbox, the default row displays in the data entry grid of the batch record. To speed data entry and increase efficiency, we recommend you mark this checkbox and display the default row. Additionally, you may find it helpful to specify the row display in a different color than the rest of the grid to help differentiate it from those rows that contain data. For more information, see "Setting the batch color display option" on page 122.

5. You can specify and use defaults even if you choose not to display the default row. Mark an option to select how to access defaults when you enter information in a batch. All these settings help save time when you create batches, use the one with which you are most comfortable.

Note: Default options set here are active in both the gift data entry grid and the constituent window of the batch record.

F2 - Insert default values when F2 is selected - defaults are displayed only when you press **F2** on your keyboard while the cursor is in a field for which you defined a default on the Defaults tab.

Auto-insert by field - when focus is placed in a field - the program automatically displays any defined defaults when you place the cursor in a field.

Auto-insert by row - when focus is placed in a row - the program displays defaults for an entire row when you place the cursor anywhere in it.

6. From the tree view, select the **EFT Options** branch (it is visible only if you have the optional module *RE:EFT*). The **EFT Options** for batches appear on the right. If the branch is not visible and you have *RE:EFT*, double-click **Default batch information** and **EFT Options** appears in the tree view. For more information, see the *Electronic Gifts (EFT) Guide*.
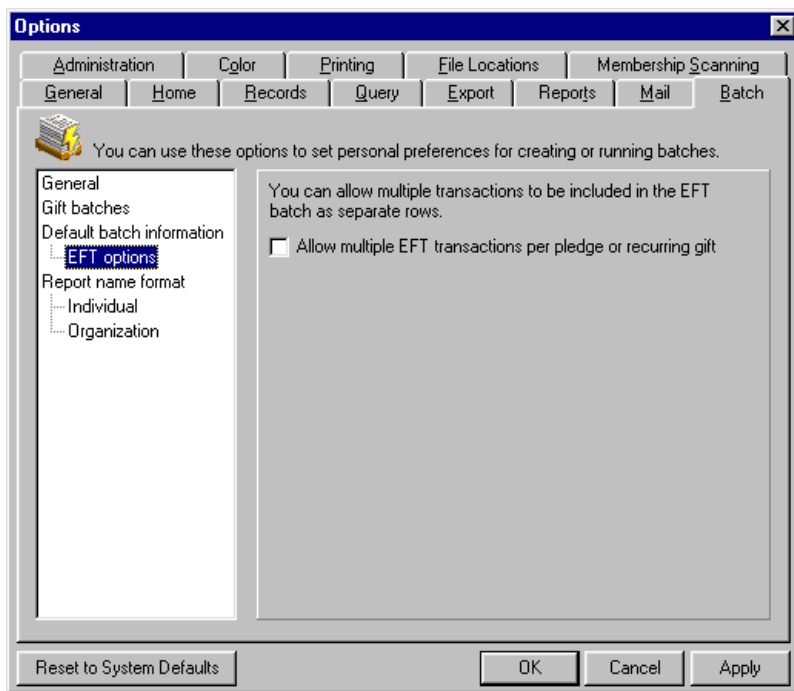
7. Mark the **Allow multiple EFT transactions per pledge or recurring gift** checkbox if you want to allow electronic fund transfers for each individual payment for pledges and recurring gifts.

8. Click **Apply** to save your selections and keep User Options open, or click **OK** to save your settings and exit User Options.

▶ **Setting report name formats for batches**

Note: All other constituent names appearing on a report, such as honor/memorials and soft credit recipients, are printed using the full name.

You can set batch report formats for names of individual constituents or organizations who give gifts for a gift batch, or who are entered in a constituent batch.

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Batch tab.

3. From the tree view on the left, if **Individual** and **Organization** are not already visible, double-click **Report name format** and they appear.

4. Select **Individual** to determine how individual names print on all batch reports.
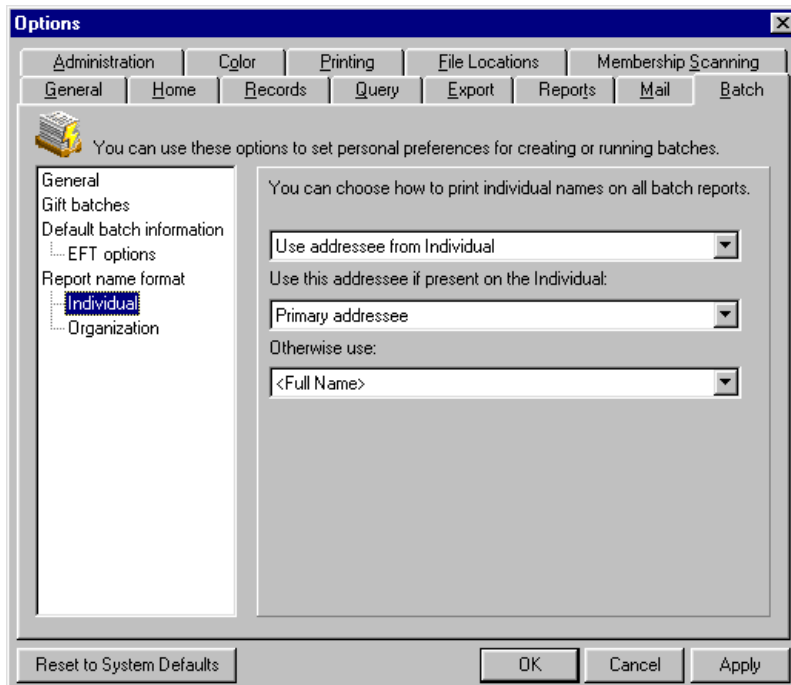
5. Select a format in the **You can choose how print individual names on all batch reports** field. Click the down arrow to list the possible entries.

6. If you select "Use addressee from Individual", you can choose an addressee from the individual record. Specify your entry in the **Use this addressee if present on the Individual** field. You must also specify an entry in the **Otherwise use** field to use as a backup in case the program cannot find the first addressee format you specify. If the program cannot find either addressee, it uses Title 1, First name, Middle name, Last name, and Suffix 1.

Note: An embedded addressee/salutation lets you define the addressee/salutation each time you use it.

7. If you select "Use addressee from Configuration", you can select any defined addressee or an embedded addressee as your entry in the **Use addressee from Configuration** field. If you select an embedded addressee (Const Addr/Sal), the **Use this addressee if present on the Individual** and **Otherwise use** fields appear and you must select entries in them as in step five. For more information about embedded addressees, see the Addressee/Salutations section in the "Configuration" chapter of the *Configuration & Security Guide*.

8. Select **Organization** to determine how organization names print on batch reports.
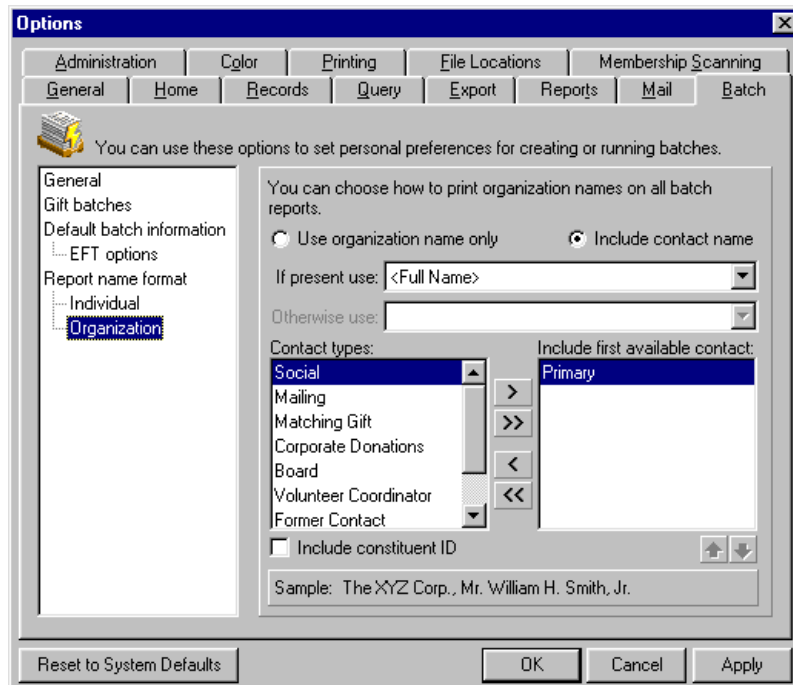
Note: Contacts can be constituents, solicitors, or honor/memorials.

9. The **Use organization name only** option defaults to marked. If you mark the **Include contact name** option, the **If present use** field is enabled for you to select a format for the contact name to appear with the organization name in batch reports.

10. Name is the default for the **If present use** field. Click the down arrow to view the other possible entries. If you select any entry other than Name, the **Otherwise use** field is enabled with the default entry of Name. If the program is unable to find your selection in either field, it displays the name as it is entered on the contact record.

11. The **Contact Types** box lists all contact types. Use the arrows to move the types you want the program to check into the **Include First Available Contact** box. The program checks these types to locate a contact to display in batch reports. You can use the up and down arrows to adjust the order in which the contact types list. Contacts are checked in the order in which you place them in the box. For example, if you move Business contact and Primary contact into the **Include First Available Contact** box and Business contact is on top, the program uses the first Business contact it finds. If it cannot find a Business contact, the program uses the Primary contact.

12. If you mark the **Include Constituent ID** checkbox, the ID appears with the organization name in the report.

13. The **Sample** display shows how the name format you selected appears in the report.

14. Click **Apply** to save and apply your changes and keep the Options screen open. Click **OK** to save your changes and exit the Options screen.

    If you want to undo any changes you made and reestablish all program settings, click **Reset to System Defaults**. To exit User Options without saving your most recent changes, click **Cancel**.
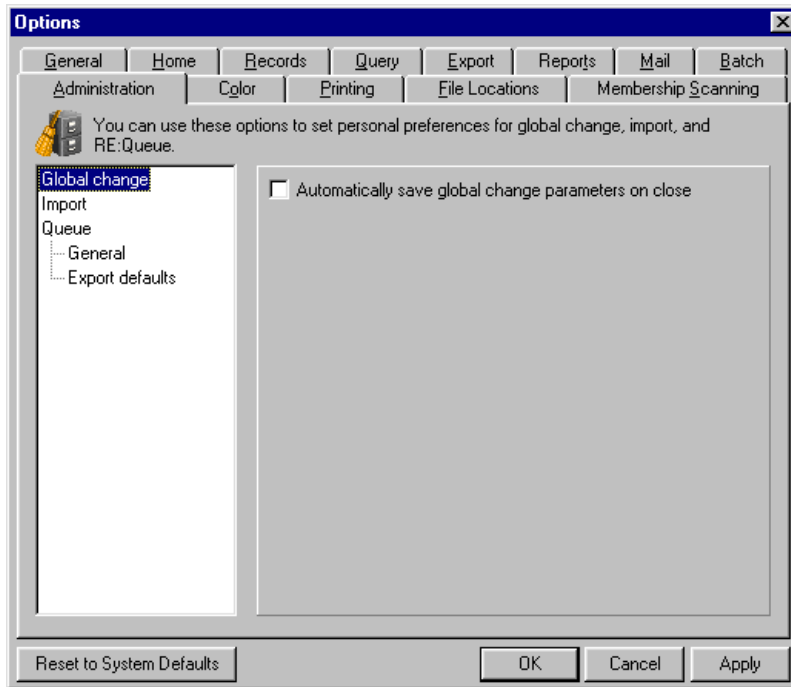
Administration Options

Set global change and import preferences for *Administration*. You can also specify general settings and export defaults for the optional module *RE:Queue for Task Scheduling*.

▶ **Setting the global change option**

You can automatically save global change parameters.

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Administration tab.

3. The Administration tab opens with **Global change** selected in the box on the left. You can mark the **Automatically save global change parameters on close** checkbox to save global changes automatically without being asked if you want to do so. If a global change has not been saved before, when you close it, the Save As screen appears so you can name and save it. If a global change has already been saved, when you close it, the parameters are saved without the Save As screen appearing.

4. Click **Apply** to save your selections and keep User Options open, or click **OK** to save your settings and exit User Options.

▶ **Setting the Import option**

You can save import parameters automatically.

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Administration tab.

3. From the list on the left, select **Import**. The **Import** option appears on the right.
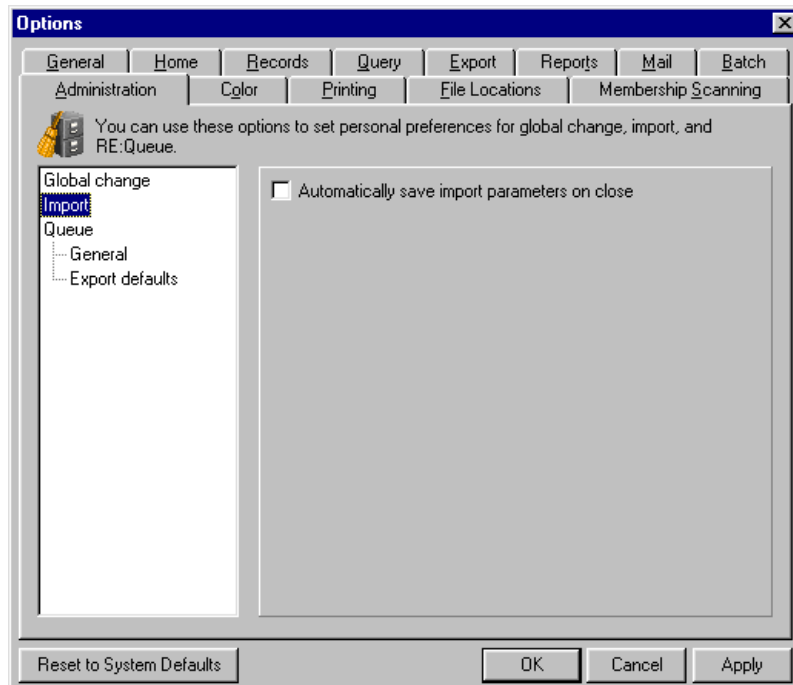

4. Mark the **Automatically save import parameters on close** checkbox to save imports automatically without being asked if you want to do so. If an import has not been saved before, when you close it, the Save As screen appears so you can name and save it. If an import has already been saved, when you close it, the parameters are saved without the Save As screen appearing.

5. Click **Apply** to save and apply your changes and keep the Options screen open. Click **OK** to save your changes and exit the Options screen.

    If you want to undo any changes you made and reestablish all program settings, click **Reset to System Defaults**. To exit User Options without saving your most recent changes, click **Cancel**.

▶ **Setting Queue General options**

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Administration tab.

3. From the list on the left, select **Queue**, **General**. The **Queue General** options appear on the right.
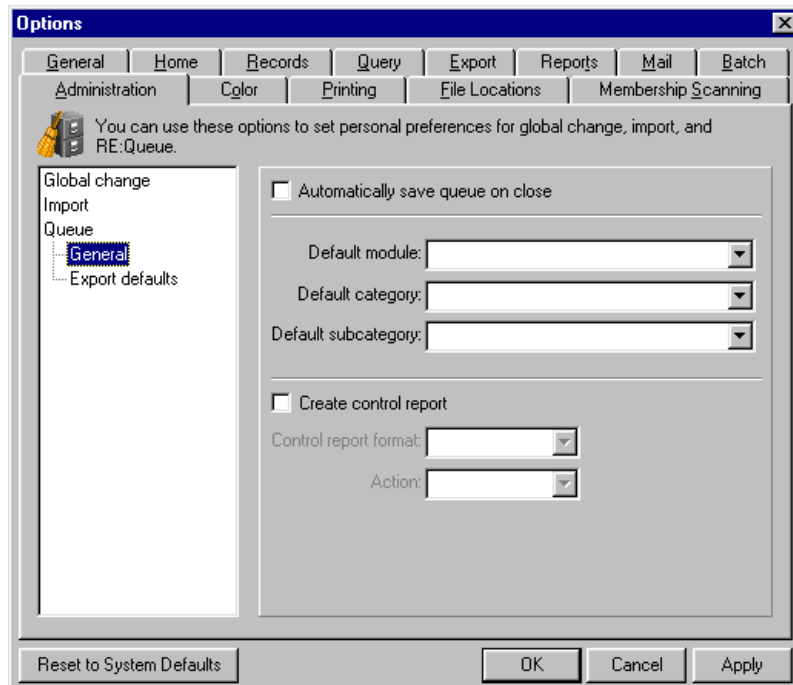
4. To automatically save the information entered in a queue when you close the queue, mark the **Automatically save queue on close** checkbox.

5. In the **Default module** field, select a module to default in the **Module** field on the queue setup screen. The available modules are *Export*, *Query*, *Reports*, and *Mail*.

   Selecting defaults is useful when you enter the same type of information more than once. For example, if you have multiple *Mail* tasks to run, you can select Mail in the **Default module** field.

6. In the **Default category** field, select a category to default in the **Category** field on the Queue setup screen. Categories are used to further specify the type of module you are working with.

   Selecting defaults is useful when you enter the same type of information more than once. For example, if you have more than one group of letters to print for *Mail*, you can select Letters in the **Default category** field.

7. In the **Default subcategory** field, select a subcategory to default in the **Subcategory** field on the queue setup screen. The subcategory specifies a further breakdown within the category of the queue.

   Selecting defaults is useful when you enter the same type of information more than once. For example, if you have different types of donor acknowledgement letters to print, you can select Follow-up Letters in the **Default subcategory** field.

8. To create a control report for your queue, mark the **Create control report** checkbox. A control report lists the queue name, description, and all the tasks run in the queue.

9. In the **Control report format** field, select the format you want for your control reports. You can either select to create a detail or summary control report.

   A detail control report lists all the options, checkboxes, and other specific properties selected for items in the queue. A summary report lists several properties for items in the queue, but does not include all information about items in the queue.

10. In the **Action** field, select whether you want to export, print, or send the control report as an email.

11. Click **Apply** to save your selections and keep User Options open, or click **OK** to save your settings and exit User Options.

‣ **Setting Queue Export default options**

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Administration tab.

3. From the list on the left, select **Queue**, **Export defaults**. The **Queue Export default** options appear on the right.
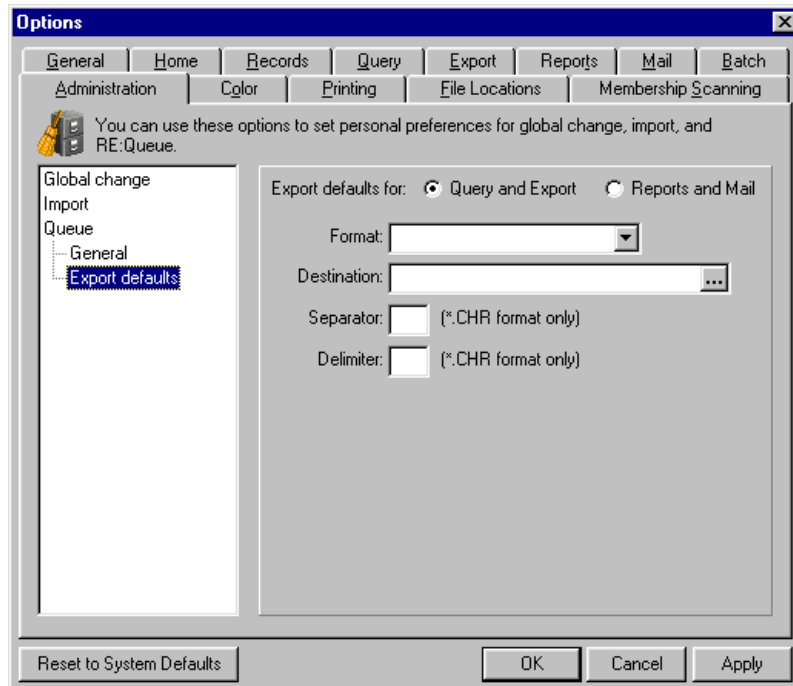
4. Mark the **Query and Export** option. You want to define defaults for the *Query* and *Export* modules.

5. In the **Format** field, select the format for *Query* and *Export* queues when they are exported. For example, you can select to have your queue export in a Text format or an Excel format.

6. In the **Destination** field, select the location where you want the *Query* or *Export* queue to be exported. To browse to a file location, click the ellipsis to the right of the field. A browse screen appears.

   Select the file location and click **OK**. You return to the Options screen.

   After you export the queue, you can find the exported file by locating the folder you specified on the browse screen.
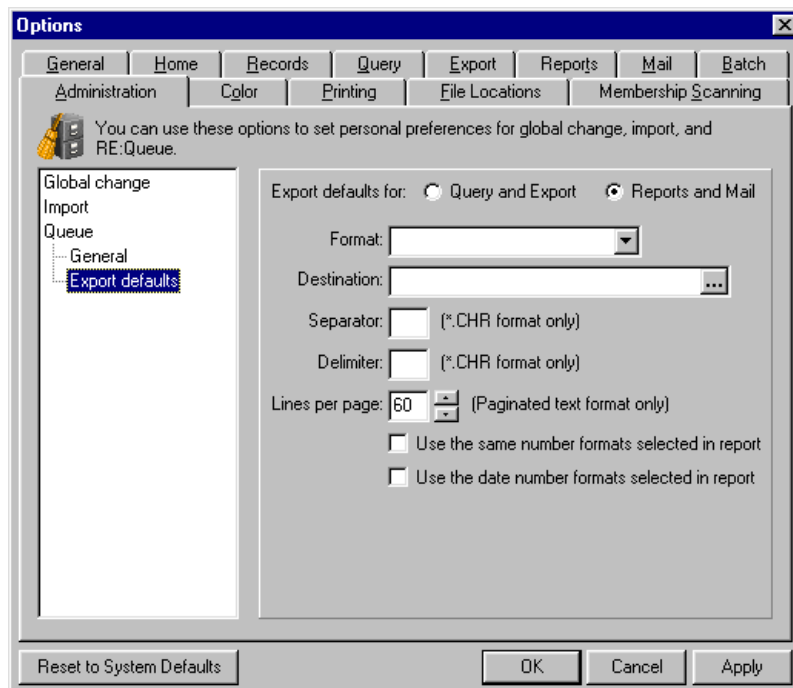
7. In the **Separator** field, enter the character you want to use to separate the data in an export. For example, you can use a comma as the character for separating fields in an export.

8. In the **Delimiter** field, enter the character you want to use to separate the data in an export. For example, you can use quotation marks as the character for separating strings of information in a field.

   If you select a comma as separator and quotation marks as delimiter, and export records with **Name** and **Age** selected as output, your results appear formatted as:

   "Mark D. Adamson","46"
   "Allison E. Andrews","41"
   "Dustin S. Andrews","47"

   Each output field in separated by the character you entered in the **Separator** field and each output field is enclosed in the character you selected in the **Delimiter** field.

9. Select the **Reports and Mail** option. You want to define defaults for the *Reports* and *Mail* modules. Additional fields appear specific to the *Reports* and *Mail* modules.

10. In the **Format** field, select the format for *Report* and *Mail* queues when they are exported. For example, you can select to have your queue export in a Text format or an Excel format.

11. In the **Destination** field, select the location where you want the *Report* or *Mail* queue to be exported. To browse to a file location, click the ellipsis to the right of the field. A browse screen appears.

    Select the file location and click **OK**. You return to the Options screen.

    After you export the queue, you can find the exported file by locating the folder you specified on the browse screen.

12. In the **Separator** field, enter the character you want to use to separate the data in a report. For example, you can use a comma as the character for separating data in a report.

13. In the **Delimiter** field, enter the character you want to use to separate the data in a report. For example, you can use quotation marks as the character for separating strings of information in a field.

    If you select a comma as separator and quotation marks as delimiter, and select **Name** and **Age** as output, your results appear formatted as:

    "Mark D. Adamson","46"
    "Allison E. Andrews","41"
    "Dustin S. Andrews","47"

    Each output field in separated by the character you entered in the **Separator** field and each output field is enclosed in the character you selected in the **Delimiter** field.

14. In the **Lines per page** field, select the number of lines you want to appear for each page in the report by clicking the up and down arrows.

15. To use the same number formatting you selected for the report, mark the **Use the same number formats selected in report** checkbox. If you unmark this checkbox, the report uses the number formats specified in your *Windows* control panel settings.

16. To use the same date formatting you selected for the report, mark the **Use the date number formats selected in report** checkbox. If you unmark this checkbox, the report uses the date formats specified in your *Windows* control panel settings.

17. Click **Apply** to save your selections and keep User Options open, or click **OK** to save your settings and exit User Options.

Color Options

Set options to determine the color in which various text and fields display throughout *The Raiser's Edge*.

▶ **Setting options for general color displays**

> **Note**: Required fields are those in which you must enter a value before you can save a record. Fly-over text is a word or words (usually a field name such as **Marital status**) you can click to access a screen where you can add and edit entries if you have security rights. Locked cells are those in which you can only view, not enter or edit, data.

Select the color in which you want to display required fields (those that must contain an entry before you can save a record), fly-over text (such as some submenus and drop-down lists), and locked cells (those in which you cannot edit an entry) in grids.

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Color tab.
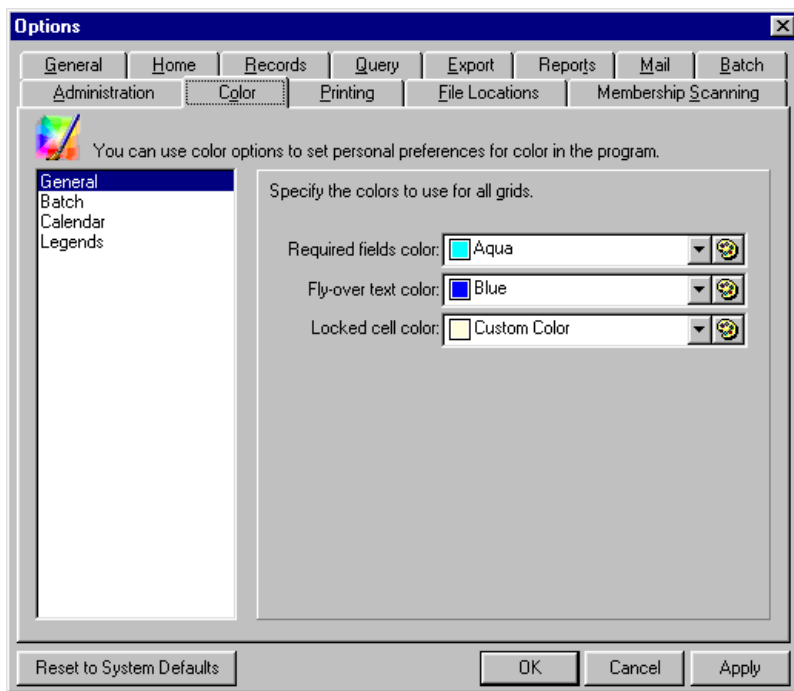
3. The Color tab opens with **General** selected in the list on the left. In the **Specify colors to use for all grids** frame, determine a **Required fields color**, **Fly-over text color**, and a **Locked cell color**. Click the down arrow to select a predefined color.

4. To create a customized color, click the palette. The Color Picker screen opens to the Named Colors tab showing standard colors that are available.
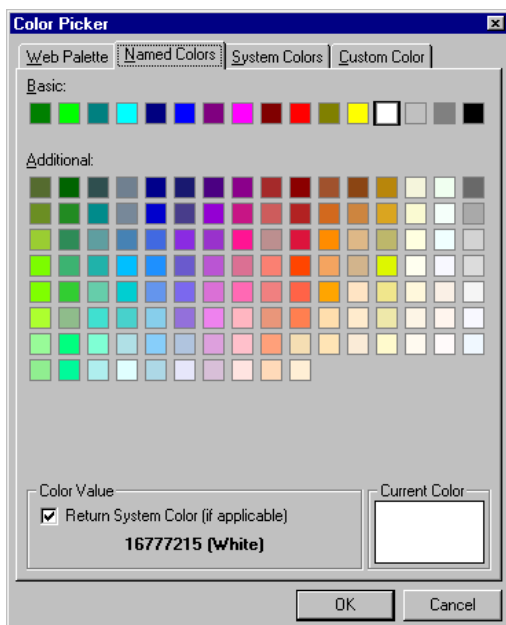

5. Select the Custom Color tab.
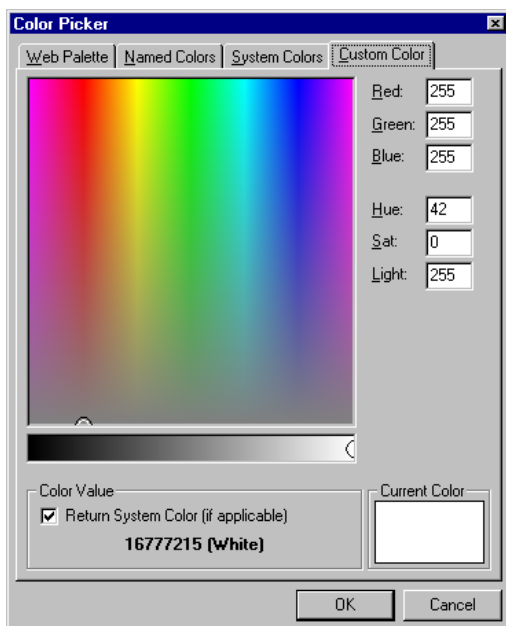
6. Either click the color on the palette that you want to use, or manually enter the values in the **Red**, **Green**, **Blue**, **Hue**, **Sat** (saturation), and **Lum** (luminosity), fields. Once you create a new color, click **OK**.

7. Click **Apply** to save your selections and keep User Options open, or click **OK** to save your settings and exit User Options.

▶ **Setting the batch color display option**

Select the color in which the default row displays on the Batch screen data entry grid.

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Color tab.

3. From the list on the left, select **Batch**. The **Batch** color options appear on the right.
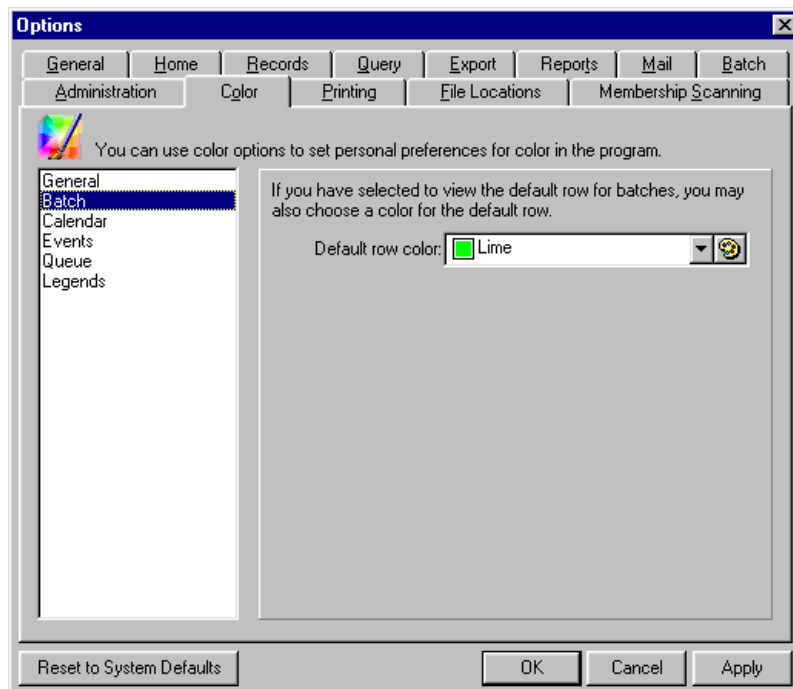

4. If you elected on the Batch tab of User Options to view a default row in the batch data entry grid, you can enter a **Default row color**. Making the default row a different color than the rest of the grid helps you avoid confusing it with rows in which you enter data.

5. Click **Apply** to save your selection and keep User Options open, or click **OK** to save your settings and exit User Options.

▶ **Setting calendar color display options**

Select the color in which event date cells and action date text display.

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Color tab.

3. From the list on the left, select **Calendar**. The **Calendar** color options appear on the right.
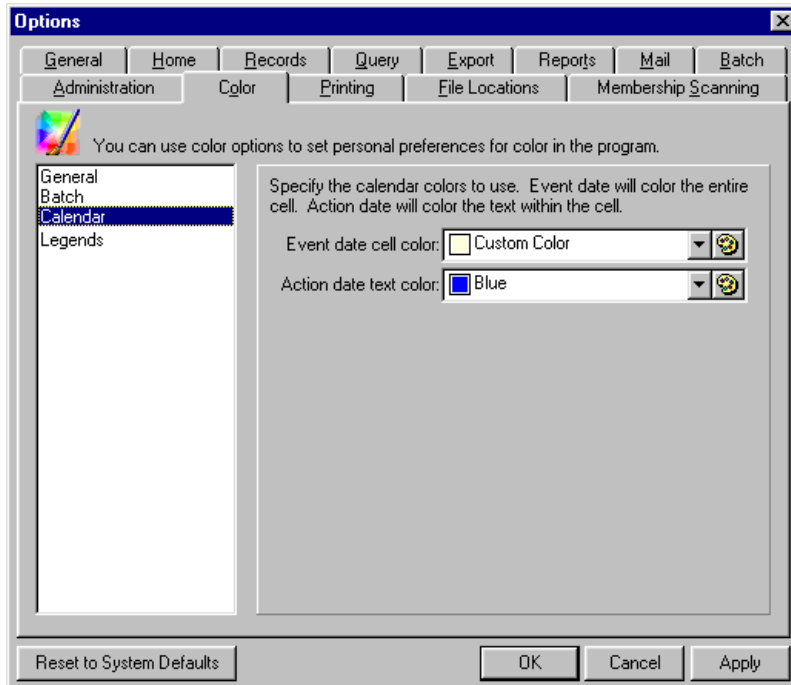
4. Specify a color in the **Event date cell color** field to determine how the entire event date cell displays. In the **Action date text color** field, select the color in which you want your event action text to appear within the cells. You may want to change the colors on these items to make them stand out on the Calendar of Events. Click the down arrow to select a predefined color or the palette to create a new custom color.

5. Click **Apply** to save your selections and keep User Options open, or click **OK** to save your settings and exit User Options.

▶ **Setting legend display preferences**

You can set preferences for the display of legends. A legend is a way of formatting text that lets you quickly identify the status or type of a record in a grid. For example, you can specify that pledges display in a different color and font than other gifts in the Gifts grid of the constituent record.

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Color tab.

3. From the list on the left, select **Legends**. The **Legends** color options appear on the right.
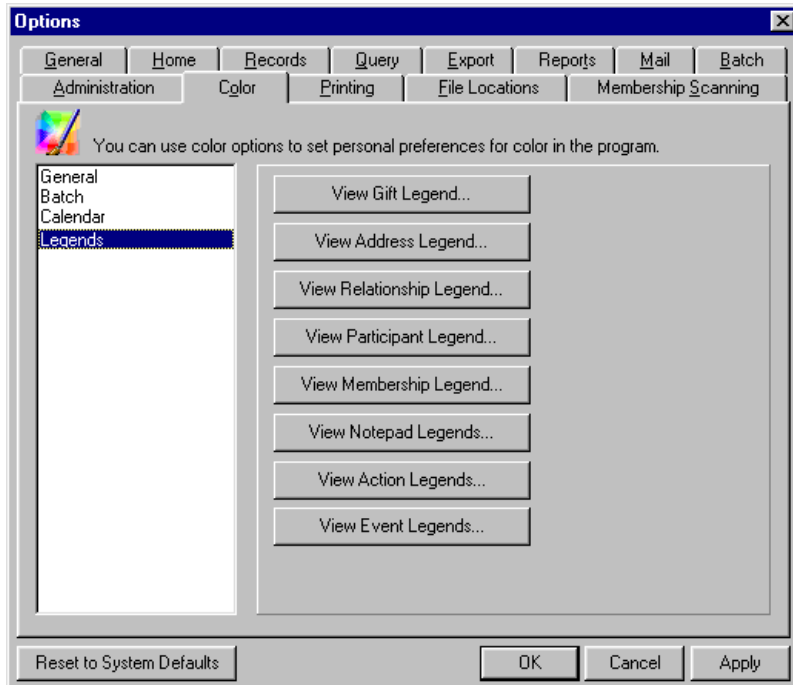
Note: If you select to **View Notepad Legends**, a screen appears so you can select a type of Notepad. The Legends screen for Notepads appears.

4. Select whether you want to **View Gift Legend**, **View Address Legend**, **View Relationship Legend**, **View Participant Legend** (if you have the optional module *Event Management*), **View Membership Legend** (if you have the optional module *Membership Management*), **View Notepad Legends**, **View Action Legends**, or **View Event Legends** (if you have the optional module *Event Management*). When you click any of these buttons, the Legend screen appears. For example, the Legend screen for gifts appears as follows.
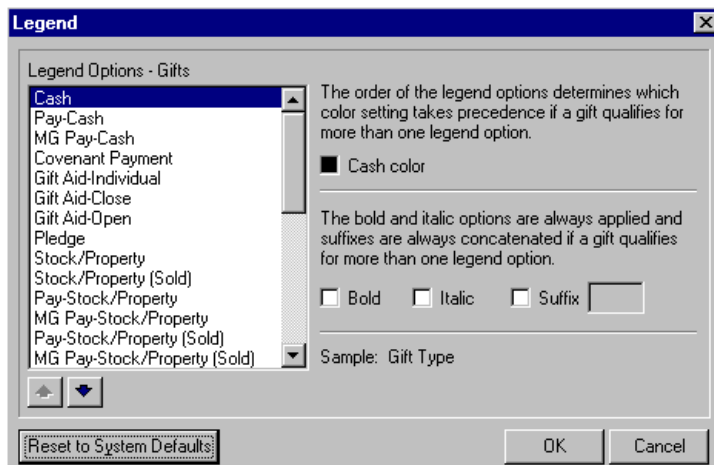
5. Select the color in which you want to display each record. Click the **color** box for the selected record in the **Legend Options** box and the Color screen appears for you to select a predefined color or create a new one in which you want the legend to display. For example, you may want to display Soft Credits in a different color than other gifts on the grid.

> **Note**: The entries in the **Legend Options** box on the left are dependant upon the type of legend you select to view. The order of the options in the box affects the display. A record that meets the criteria for two or more legends displays according to which criteria appears first in the **Legend Options** box. Use the up and down arrows to change the order of the options.

6. You can make legend text **Bold** or **Italic**. You can also mark a checkbox to include a **Suffix** and enter the suffix in the provided field. For example, you can add the suffix "-pl." to differentiate pledges from other gifts. The **Sample** display shows an example of your text and color selections.

7. On the Legend screen, if you want to undo any settings you selected and return to the program settings for a particular type of legend, click **Reset to System Defaults**. Click **OK** to save your changes and return to the Color tab with **Legends** highlighted in the box on the left. Click **Cancel** to return to the Color tab without saving your most recent changes for that particular type of legend.

8. On the Color tab, click **Apply** to save and apply your changes and keep the Options screen open. Click **OK** to save your changes and exit the Options screen.

   If you want to undo any changes you made and reestablish all program settings, click **Reset to System Defaults**. To exit User Options without saving your most recent changes, click **Cancel**.

Printing Options

Set printing options to determine which parameters to use when printing, previewing, or exporting from various types of records.

▸ **Setting printing options for records**

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the Printing tab.
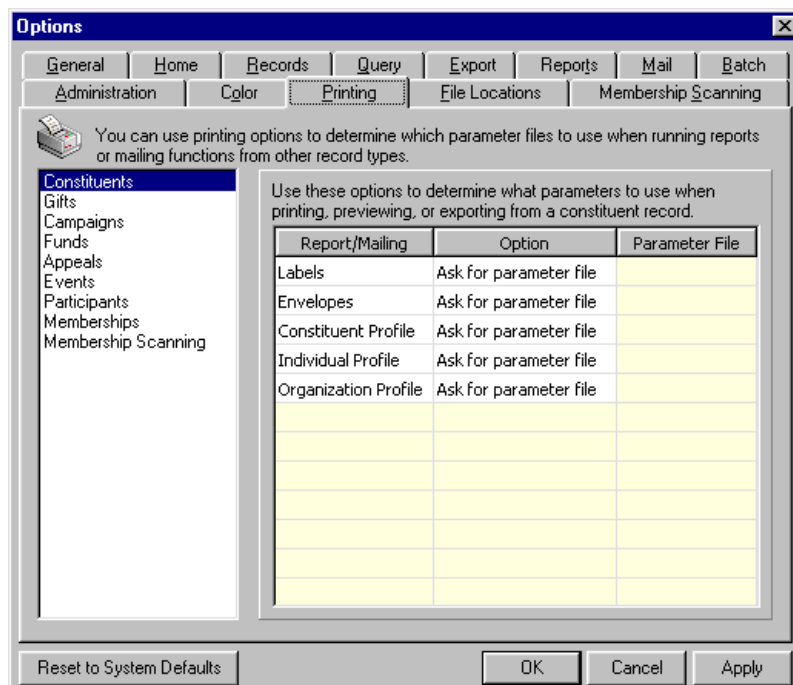
3. When you select an option in the list on the left, the Printing grid for that record type appears on the right. In the grid, the **Report/Mailing** column lists the available options for printing from the **File** menu of the selected record type. You cannot add to or edit these options. For each printing option, select a default file to use in the **Option** column. Your choices are Ask for parameter file or Use this parameter file.

If you select "Ask me for a parameter file", each time you print a report or mailing, the Select a Parameter File screen appears listing your saved reports or mailings. From the Select a Parameter File screen, you can either select an existing parameter file or create a new one to use as basis for only that print run.

Note: If you select a parameter file as a default and you later delete the file, the program asks you to select another when you try to run a report or mailing type for which it is selected as the default.

If you select "Use this parameter file", the binoculars appear in the **Parameter File** column. Click the binoculars and the Select a Parameter File screen appears so you can select a saved file to use as the default whenever you print this report or mailing type. When you select a parameter file, it appears in the **Parameter File** column of the grid. Each time you print, the program automatically uses the parameter file you select here. When you select "Use this parameter file", you cannot change the file in *Reports* or *Mail*. You can only change it here in User Options.

4. Click **Apply** to save and apply your changes and keep the Options screen open. Click **OK** to save your changes and exit the Options screen.

   If you want to undo any changes you made and reestablish all program settings, click **Reset to System Defaults**. To exit User Options without saving your most recent changes, click **Cancel**.

File Location Options

On the File Locations tab of User Options, set options for default file locations when you export files to other programs from **The Raiser's Edge**. You can specify the location of your *Crystal Reports* database, change the default location of your word processing documents and letters, and change the default location of your *Excel* spreadsheets.

If you have the *AddressAccelerator* service, specify the location of the validation files on this tab. If you use *ICVerify*, specify a data path and credit card approval station ID on this tab. If you use the optional module *MatchFinder*, specify the location of the downloaded *MatchFinder* database on this tab.

▶ **Setting file location options**

You can define the locations of other programs and match them with specific file types from **The Raiser's Edge**.

1. From the menu bar, select **Tools**, **User Options**. The Options screen appears.

2. Select the File Locations tab.
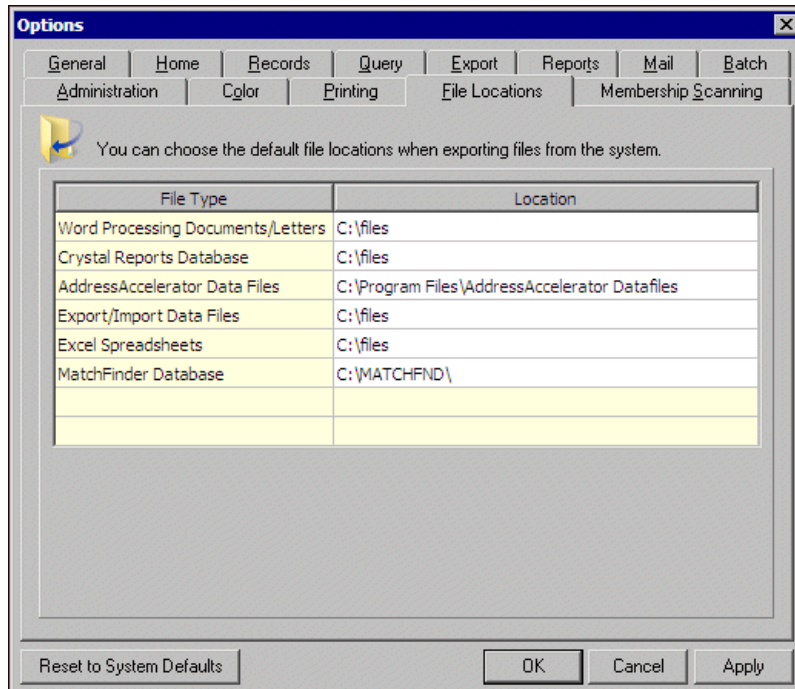
> **Note**: If you do not specify a **Location** for **Export/Import Data Files**, they default into the "My Documents" directory on your hard drive.

3. All *The Raiser's Edge* file types list in the **File Types** column of the grid. These entries cannot be edited. In the **Location** column, enter the path for the program to which you want to export each file type. When you place the cursor in a **Location** field, the **Browse** button is enabled so you can find the path to a particular program.

4. If you selected ICVerify as your credit card processor in the Batch business rules in *Configuration*, a **Credit Card Authorization Data Path** row is available for you to enter the location of your validation files. The **ICVerify station ID** field is also available for you to enter your credit card approval station ID.

5. Click **Apply** to save and apply your changes and keep the Options screen open. Click **OK** to save your changes and exit the Options screen.

   If you want to undo any changes you made and reestablish all program settings, click **Reset to System Defaults**. To exit User Options without saving your most recent changes, click **Cancel**.
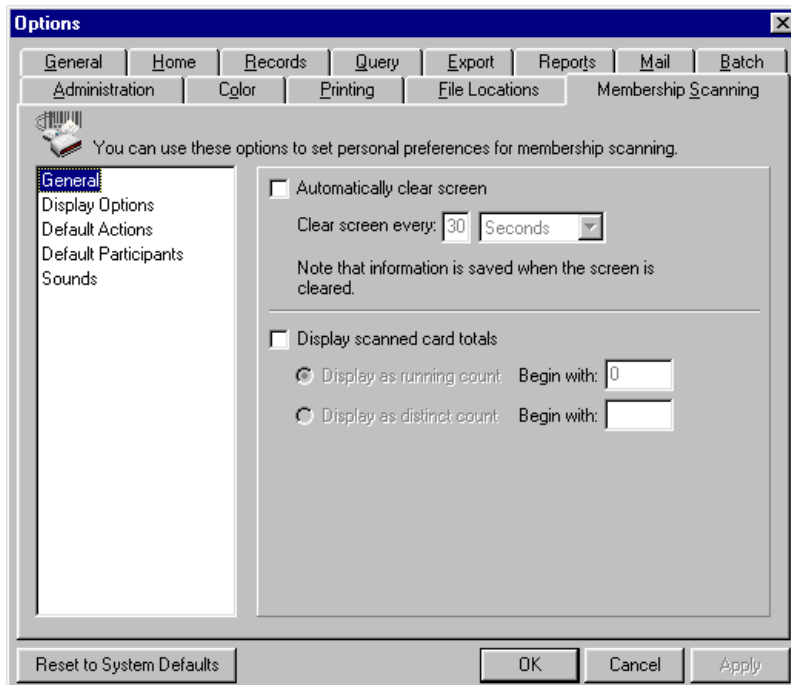
Membership Scanning Options

Specify options to determine membership scanning general settings, display options, default actions, default participants, and sounds.

▶ **Setting General scanning options**

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools**, **User Options**. The Options screen appears.

2. Select the Membership Scanning tab. The **General** options display automatically.

3. If you want the Membership Scanning page to be refreshed periodically, mark the **Automatically clear screen** checkbox and then enter an amount of time in the **Clear screen every** fields. For example, you can select to clear the page every 30 seconds. The information is saved in the Scanning Details screen when the screen is cleared. For information about the Scanning Details screen, see the *Membership Scanning Guide*.

4. If you want to see certain totals for the scan session in the status bar at the bottom of the Membership Scanning page, mark the **Display scanned card totals** checkbox. Select the **Display as running count** or **Display as distinct count** option, depending on how you would like to view the totals. Then, in the **Begin with** field for the option you choose, enter the number with which you want counting to begin for the scan session.

5. Click **Apply** to save your selection and keep User Options open, or click **OK** to save your settings and exit User Options.

‣ **Setting display options for scanning**

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools**, **User Options**. The Options screen appears.

2. Select the Membership Scanning tab. Select **Display Options** from the list on the left side of the screen.
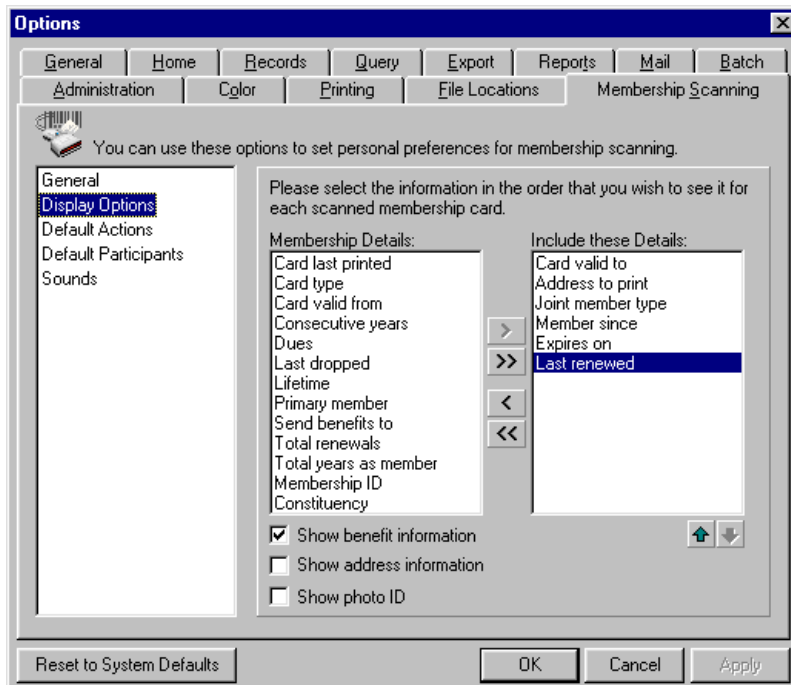
3. Highlight the selections in the **Membership Details** box you want to appear on the screen during a scan session and click the single right arrow to move them to the **Include these Details** box.

   Certain selections default into the **Include these Details** box. To remove them, highlight these selections in the **Include these Details** box and click the single left arrow to move them back to the **Membership Details** box. Use the up and down arrows below the **Include these Details** box to arrange the order information appears on the Scan screen.

4. To view benefit information in a grid on the Membership Scanning page, mark the **Show benefit information** checkbox.

5. If you want to view member address information in a grid on the Membership Scanning page, mark the **Show address information** checkbox.

6. To display the member's photo on the Membership Scanning page when you scan the card, mark the **Show Photo ID**. If you do not have a member's photo in the **Photo ID** field on the member record, a generic picture file displays.

7. Click **Apply** to save your selection and keep User Options open, or click **OK** to save your settings and exit User Options.

▶ **Setting default actions for scanning**

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools**, **User Options**. The Options screen appears.

2. Select the Membership Scanning tab. Select **Default Actions** from the list on the left side of the screen.
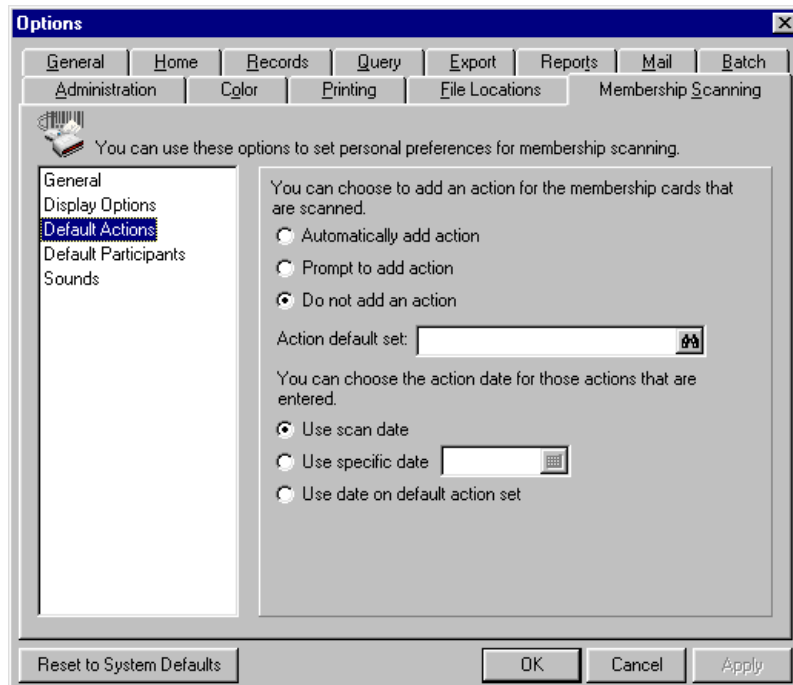
3. Select **Automatically add action** or **Prompt to add action**.

4. Select an action default in the **Action Default set** field by clicking the binoculars.The Field default sets screen appears.

5. You can select an existing default set or create a new one. For information about creating default sets, see the Program Basics chapter. Highlight the default set to use during your scan session and click **OK**. You return to the Options screen and the name of the action default set you selected or created appears in the **Action default set** field.

Warning: If you select the **Use scan date** or **Use specific date** on the Membership Scanning tab of the Options screen, this date overrides the date entered on the action default set.

6. Select an action date. You can select **Use scan date**, **Use specific date**, or **Use date on default action set** option. If you mark the **Use specific date** option, enter a date in the field to the right of the option or click the calendar to select a date.

7. Click **Apply** to save and apply your changes and keep the Options screen open. Click **OK** to save your changes and exit the Options screen.

▶ **Setting default participants for scanning**

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools**, **User Options**. The Options screen appears.

2. Select the Membership Scanning tab. Select **Default Participants** from the list on the left side of the screen.

3. If you select to **Automatically add participants**, click the binoculars in the **Participant default set** field to search for a default set to use. The Field default sets screen appears.


4. You can select an existing default set or create a new one. For information about creating default sets, see the Program Basics chapter. Highlight the default set to use during your scan session and click **OK**. You return to the Options screen and the name of the participant default set you selected or created appears in the **Participant default set** field.

5. In the **Event to Use** field, enter the name of an event or click the binoculars to search for one. The event Open screen appears.

6. In the **Participant type** field, select whether the participant is a Registrant, Guest, or Sponsor.

7. Then, choose an option to **Make the primary member the participant**, **Make the cardholder the participant**, or to **Prompt each time**.

8. Mark the **Add registration fees or other donations** checkbox to add a registration fee or other donation information along with the gift default information. For example, a member has his card scanned for entrance to your zoo and there is a default participant record established for him for a seminar that requires he bring one canned good to feed the homeless. This "other donation" can be added as a Gift-in-Kind.

9. Click **Default Settings**. The Registration and Other Donation Information screen appears. Selections on this screen are similar to the Registration Fees/Donations tab of a participant record.

10. Enter registration information for the fields you want and click **OK** to return to the Options screen.

11. Click **Apply** to save and apply your changes and keep the Options screen open. Click **OK** to save your changes and exit the Options screen.

▶ **Setting sounds for scanning**

1. From the menu bar on the shell of *The Raiser's Edge*, select **Tools**, **User Options**. The Options screen appears.

2. Select the Membership Scanning tab. Select **Sounds** from the list on the left side of the screen.
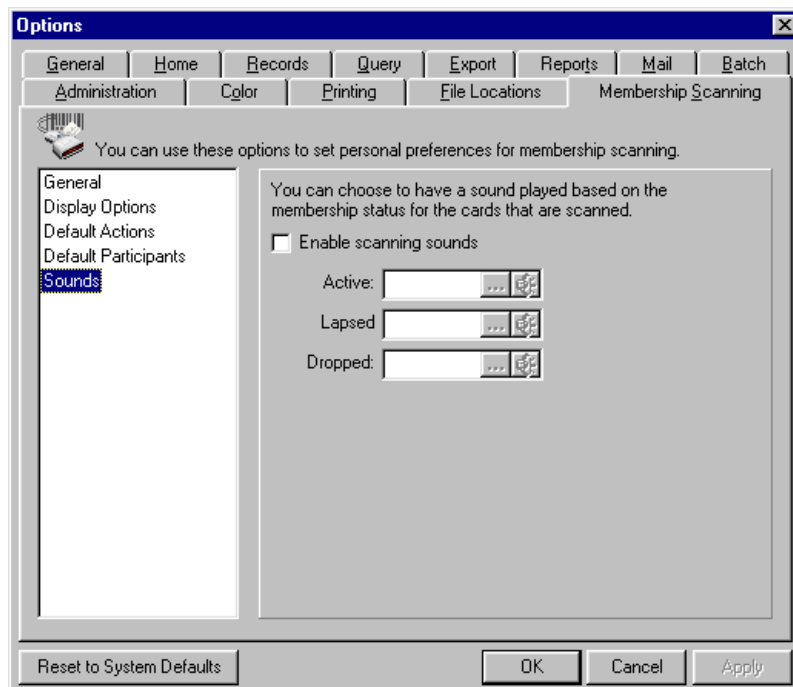
3. To have a sound play based on the membership status when you scan the membership card, mark **Enable scanning sounds**.

Note: You can use any .wav file with *The Raiser's Edge* to hear sounds in *Membership Scanning*.

4. In the **Active**, **Lapsed**, and **Dropped** fields, click the browse button to select a .wav sound file stored on your computer. To hear the sound, click the far right button in the appropriate field.

5. Click **Apply** to save and apply your changes and keep the Options screen open. Click **OK** to save your changes and exit the Options screen.

6. If you want to undo any changes you made and re-establish all program settings, click **Reset to System Defaults**. To exit User Options without saving your most recent changes, click **Cancel**.

Data Entry Protocol

This chapter is intended to provide you with ideas for creating a Data Entry Protocol Guide for your organization. A Data Entry Protocol Guide specifies how your organization enters and maintains records and performs various functions. Such a guide helps new employees learn your data entry rules and maintain consistent data entry through employee leaves, vacations, and turnover.

Be sure to visit the support site at www.blackbaud.com to view Data Entry Protocol Guides submitted by other organizations. You may be able to use these guides, along with this chapter as a starting point for your own guide.

We recommend you create a Data Entry Protocol Guide for your organization as soon as possible. We want to offer you helpful hints so you can begin using *The Raiser's Edge* correctly from the start and avoid any potential difficulties that can arise from inconsistent data entry. For example, when your organization has saved only a few queries, you may be tempted to name them numerically, but we recommend you give them easily identifiable, descriptive names to avoid future identification difficulties when you may accumulate dozens of saved queries. A Data Entry Protocol Guide not only helps you standardize and streamline your data, it increases your efficiency by reducing time spent deciding what information to include on a record or performing tasks, such as setting up queries and reports, that have already been executed.

You can adapt the helpful hints and ideas this chapter offers specifically to your organization. The tips range from the simple (make sure you include at least one constituent code on each constituent record) to the complex (steps for consistently entering gifts). By creating rules and guidelines for your data entry, you help ensure the consistency of your data. Consistent data entry is crucial to the accuracy and validity of your reports, summaries, and queries and helps you efficiently use *The Raiser's Edge*.

Before you begin entering data into *The Raiser's Edge*, you should define basic data entry formats. Determine such things as whether to use abbreviations for streets or roads and which phone number formats you prefer. Entering this information inconsistently can limit the effectiveness of your queries and reports. For example, if the phone company changes an area code, you will need to update your records containing that code. If some records contain the area code surrounded by parentheses and others do not, all entries may not appear in your query, so all your records may not be updated.

If you have not yet created a Data Entry Protocol Guide and your data entry has been inconsistent up to this point, you can take steps to standardize your data. For example, users may not have entered addresses into your database consistently. Some entered street names in full, while others used abbreviations. Through *Administration,* you can globally change all records on which a particular abbreviation appears. Remember though, a global change affects the entire content of a field and can lead to unwanted changes in some records. For example, if you globally change "St" to "Street" on all records, the address "123 Harvest Street" appears as "123 HarveStreet Street". To properly make the changes, you must export the query to locate all records with "St" in the address, globally change the exported data, then import the corrected information back into your database.

This demonstrates the importance of entering information consistently as soon as you begin using *The Raiser's Edge*. By establishing and using data entry rules from the start, you can avoid having to fix problems that later arise from inconsistent data entry.

In this chapter, we offer data entry guideline suggestions for each area of the program. For detailed information, see *The Raiser's Edge* user guides. The ideas offered here are merely suggestions. To use *The Raiser's Edge*, you are not required to follow the steps described in this chapter.

Getting Started

Improve data entry consistency by establishing standard settings in *Configuration* and **Security**. You should also enter information consistently for your campaigns, funds, and appeals. These records play important roles in managing gifts, queries, reports, and exports. Set up User Options which are password based preferences for each user. Unlike settings in *Configuration*, User Options affect individual users, but they can also affect the overall consistency of your data.

Configuration

In *Configuration*, you can establish functions, defaults, and settings for *The Raiser's Edge*. Several of these functions play a key role in the consistency of your data. Security rights, set through the **Security** link of *Administration*, define users' rights to specific areas of the program. We recommend security rights to *Configuration* be limited to a few key users. This ensures that important system settings, field names, and field values are not arbitrarily changed by different individuals in your organization.

Your selections in *Configuration* affect all users, so it is extremely important that you configure *The Raiser's Edge* properly to meet the needs of your organization. Only those *Configuration* options that promote data consistency are discussed here. A full description of all options available in *Configuration* is available in the Configuration chapter of the *Configuration & Security Guide*.

Tables

Tables are lists of possible entries for a particular field. In *The Raiser's Edge*, any field with a down arrow has a corresponding table. When you click the down arrow, the table entries display. Set security rights to add, edit, or delete entries for tables as a group, or set rights for each table individually.

Tables make data entry faster and more consistent because you select from a predefined list, rather than manually entering a value each time.

To ensure standardized table entries, we suggest you give only a few individuals at your organization the right to create new table entries. If all data entry personnel at your organization have the ability to enter new table entries, you may end up with multiple variations for the same entry. For example, the Education/School screen on the Bio 1 tab of the constituent record contains the **Majors** table. For this table, one user may add English as a table entry while other users might add Engl., Eng., and Literature. If you have more than one table entry for an item, problems can arise in the future when you try to query on these records. For example, if a library needs a list of all constituents who are English majors in college to target for a Used Book Sale appeal, and several table entries for English majors exist, the results of a query on a single entry will not be complete. Constituents whose major is listed as Engl. or Literature will not appear in a query searching for "English" majors.

Additionally, restricting access to table entries helps ensure that tables are not overloaded with too many entries. If a table has a large number of entries (many of which may be infrequently or never used), time can be wasted scrolling through all the entries. To ensure tables save you time and maintain data entry consistency, we strongly suggest you limit the number of users who create table entries in order to prevent individuals from including variations of the same entry.

Donor Categories

The **Donor Categories** table is one of two tables you can create (the other is **Attributes**). The **Donor Categories** table assigns a category to each level of giving. For example, a possible entry can be Friend, with a minimum giving amount of $20. You can also have an entry of Associate, with a minimum giving amount of $50. You can assign categories all the way up to your largest donors, perhaps Sustainer, with a minimum donation of $10,000. We recommend you establish and use donor categories. By doing so, the versatility of your reports greatly increases.

Use donor categories to determine which constituents donate the largest amounts to your organization. In *Reports*, create a Donor Category Report to list the constituents who qualify for each donor category. You can also create a Top Donor Category Report to find which constituents are your overall largest donors. This information provides a convenient way to identify the groups you want to target with your appeals. For example, if you determine the majority of your funding comes from Associates, you may want to consider sending these individuals your best appeal packages, like a glossy brochure instead of a postcard. In addition, you can graph the Donor Category Report to create a visual image of constituent giving for your donor categories.

Phone Types

Take special care setting up phone number formats when you create new **Phone Types** table entries. You must enter formats consistently or the accuracy of your queries can be affected. For example, if you enter some numbers with parentheses around the area code and others without the parentheses, a query will not locate all records with that area code.

Addressee/Salutations

Determining the appearance of constituent names in mailings is very important because it reflects your organization's attention to detail. You need to address your constituents properly on mailing labels and on the inside addresses of letters. For example, the traditional format for addressing a married couple (Mr. and Mrs. John Smith) does not always apply. If you solicit constituents who are married but do not share the same last name, you should select the proper addressee format. Additionally, you should try to make salutations in your mailings appropriate and personal. If you choose an informal salutation for a constituent whose first name is Robert, but who goes by Bob, you will want your salutation to read Dear Bob. *The Raiser's Edge* includes a variety of addressee/salutations, and your organization can also customize the list as different needs arise.

Attributes

Use attributes to customize *The Raiser's Edge* to suit the particular record keeping needs of your organization. Attributes give you the ability to attach important information to all types of records. Attributes allow you to define specialized information you want to track for your constituents, but for which no specific field is available. For example, you can set up an Interests table for your constituents with entries such as Golf or Boating and use the entries to more accurately target your appeals for an annual golf tournament or charity auction. By identifying constituents who have a particular interest which corresponds with one of your appeals, you can increase the effectiveness of your solicitations.

Knowing your constituents is a very important aspect of fund-raising. Therefore, you should pay special attention to setting up your constituent attributes. By recording a constituent's interests, hobbies, special dates, or even favorite restaurants, you give your organization the ability to make your solicitations as personal and thoughtful as possible.

Before you contact a constituent, select **File**, **Print** from the menu bar. Select **Constituent** or **Individual Profile**. A profile contains attribute information, notes for the constituent, and constituent relationships. Tracking attributes improves your ability to successfully appeal to your constituents.

Make sure you do not confuse attributes with information such as constituent codes. At least one constituent code should appear on each constituent record to explain why that person or organization is in your database. For example, you can code constituents as Volunteers, Prospects, Alumni, or any other entry to demonstrate why someone is a constituent. For more information about constituent codes, see the Constituent Records chapter of the *Constituent Data Entry Guide*.

Letters

Although you create the actual letters you send to your constituents in a word processing program, you name and organize these letters from the **Letters** link of *Configuration*. Before you enter information on the Letters page, make sure all the letters you intend to include have been created and stored in a word processing program. From your word processing program, print a list of the letter names you created and enter them in *Configuration*.

Tip: You can also quickly create certain types of letters directly from a constituent record. For more information, see the *Constituent Data Entry Guide*.

From the **Letters** link, you can assign letters to specific categories and enter a description and file location for each one. For example, under the category Gifts, you may have a Pledge Thank-You, a Phonathon Thank-You, and a General Thank-You letter. In the Action category, you may have a Birthday card, an Anniversary card, and an Appointment Reminder card. The information from the **Letters** link is especially important for gift entry. Before you begin entering gift information in your database, decide which letters are needed for the duration of each of your campaigns. This allows you to personalize the letters you send to your constituents. Instead of mailing a General Thank You letter for each gift, you can create letters that acknowledge the reason the gifts were given to your organization.

By customizing your thank-you letters for campaigns, appeals, or gift types, you can personalize your contact with constituents. Determining the letters to include on the Letters page also makes gift entry easier because you can quickly select the letter to send for each gift.

Please keep in mind that naming your letters is extremely important. Your letter names should accurately reflect their content. For example, if you have three letters in the Membership category named Letter One, Letter Two, and Letter Three, you will have difficulty determining which letter to use for a specific membership transaction. We suggest you give a brief, descriptive name to each letter. For example, Letter One may be better titled Individual Renewal letter. Letter Two and Letter Three may be retitled Corporate Renewal Letter and Director's Note. With these descriptive titles, anyone in your organization can easily identify which letter should be sent for a given transaction.

International Addresses and Currency

If your organization receives gifts from constituents in other countries, you can use the **International** link to define address formatting and the currency exchange rate for each country you include in your database.

The United States Postal Service provides international addressing information online at http://pe.usps.gov/. For information on current exchange rates, you can contact the financial institution where your organization banks. The Internet also offers many sites devoted to currency conversion. Because exchange rates frequently change, we recommend you update the **Exchange Rate** field entry regularly. You may want to set up a monthly timetable for updating exchange rates.

Business Rules

Business rules are designed to help you enter and track data easily and efficiently, and to help guard against data entry errors. For example, when entering a new gift, a business rule can notify you if the constituent has an outstanding pledge. Another rule specifies the minimum gift amount you allow so you can avoid errors such as entering gifts of $50.00 as $.50.

Business rules can make your data entry faster by helping you complete more than one task at a time. For example, you can apply a business rule which automatically soft credits a spouse record when a married constituent donates a gift. Or, a rule can specify that when a constituent's last name changes, the name of the constituent's spouse should also be updated. Business Rules increase your data entry consistency by ensuring all records meeting certain criteria are updated the same way.

Fields

Fields are where you actually enter information in your database. The **Fields** link is very important because this is how your supervisor determines which fields in *The Raiser's Edge* are optional and which are required. When you make fields required, a user cannot save or close the record without entering information into these fields. This prevents a user from unintentionally skipping important information fields.

Making certain fields required ensures all saved records in your database contain the necessary information your organization needs to properly track constituents. Your supervisor can decide which fields in your database are most important and make those fields required. For example, if your organization uses Social Security Numbers to track constituents, you can make the **SSN** field on individual constituent records required.

Fields used on a regular basis by many users should be made lookups. A lookup functions exactly like a table, except it does not have the down arrow in the field. When you make a field a lookup, access the list of entries by pressing **F7** on your keyboard while the cursor is in the field. A field made into a lookup appears in the list of tables on the **Tables** link and security can be assigned to it like any other table. When you first make a field a lookup, all users automatically have security rights to add, edit, and delete entries for it.

If you have fields you do not use, you can hide them. A hidden field does not appear on a record, but any data it contains is still available. If, after using *The Raiser's Edge* for awhile, you discover a field contains information you no longer use, you can hide the field. Doing so ensures the field will not be used further on any records, but saves the data already contained for historic purposes.

Security

The Raiser's Edge is shipped with the user name Supervisor and the password Admin. Because your organization initially has the same user name and password as every other organization that uses *The Raiser's Edge*, we strongly recommend you immediately change the supervisor password. We also suggest at least one other person in your organization know the supervisor password.

Supervisor

From the **Security** link of *Administration*, you can grant rights to individual users allowing them to change their own passwords. To maintain security, users with the ability to change their own passwords should do so on a regular basis. If a user forgets his password, any user with supervisor rights can access it. You should also grant users rights to change User Options. User Options are log-in specific, which means if you log into any workstation using your password your preferences are active. When you log off that workstation, your preferences are not active for the next user.

Group

Security is assigned by groups. We recommend you establish several security groups immediately, so you can add users to these groups before they begin using *The Raiser's Edge*. Make sure you give each group a descriptive name you can easily identify on the Security page. You will probably want to create a group for those users with supervisor rights. Members of this group will have full access to the program. Many, if not most, of your users can be members of a Data Entry Group. Be sure to limit security access to *Configuration* and *Administration* functions for this group. Add other groups as necessary. For example, you may want to create a group that can enter data, but cannot edit gifts.

User Options

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

General

On the General tab of User Options, we recommend you mark the **Automatically complete table entries** checkbox so *The Raiser's Edge* fills in the rest of a table entry after you enter one or two characters. For example, if you enter D, the program fills in Deceased, which is the first table entry that begins with D. Override the entry by continuing to type.

When you start working in *The Raiser's Edge*, we recommend you mark the **Show tooltips** checkbox so when you hover the cursor over a toolbar button, a description of the button's function appears under it. It is a good idea to leave this checkbox marked until you become familiar with the toolbar buttons and their functions.

Home

To save time, we recommend you mark the **Show favorites** checkbox to access your most used records directly from your Home page. Also, mark the **Show action reminders** checkbox so any actions to which you are assigned automatically list when you log into *The Raiser's Edge*.

Campaigns, Funds, and Appeals

Campaigns, funds, and appeals are central to your fund-raising success. Campaigns are your overall objectives for raising money; funds are the specific financial purpose for the money; and appeals are the solicitations and promotions that bring in the money. We strongly recommend you establish your campaigns, funds, and appeals before you begin entering gifts into *The Raiser's Edge*. By doing so, you can run a wide variety of reports and summaries to analyze every aspect of your fund-raising success.

Take a few steps to help make data entry in your campaigns, funds, and appeals quick, easy, and consistent. When you add a campaign, fund, or appeal, you do not have to enter a **Start date**, **End date**, or **Overall goal**. However, we strongly recommend you do so. Entering this information allows you to run numerous reports measuring the progress and success of your campaigns, funds, and appeals. We also recommend you set up categories to group your campaigns, funds, and appeals. By establishing categories such as Annual, Capital, or Operating for your campaigns; Scholarship or Restricted for funds; and Direct Mail, Continuous, or Major Donors for your appeals, you can expand the versatility of your queries and reports.

Occasionally, you may decide to delete a campaign, fund, or appeal. As an alternative, we recommend making the campaign, fund, or appeal record inactive. You cannot associate gifts or other records with an inactive campaign, fund, or appeal, but it does remain in your database for historic and reference purposes. If you do decide to delete a campaign, fund, or appeal, we highly recommend you first back up your database.

Data Entry

The various data entry guides contain information and procedures for entering all types of data into *The Raiser's Edge*. You can take several steps to help speed and simplify your data entry and ensure the consistency of the information you enter.

Constituents

Entering your constituents in a standardized fashion greatly increases the accuracy of your queries and reports and maximizes the efficiency of your organization. Additionally, take steps to ensure your constituents are referred to by the proper addressee/salutation and that mailings are sent to the correct address. Before adding a constituent record, always perform a search to ensure the constituent does not already have a record in your database. Doing so prevents duplicate records and increases the accuracy and effectiveness of your reports, mailings and queries.

Constituent Codes

The **Constituent code** table on the Bio 2 or Org 2 tab of a constituent record is where you explain why a constituent record is in your database. We highly recommend you create a set of codes (such as Board Member, Employee, Member, and Volunteer) and assign at least one to every constituent record. You can run queries and establish security rights for your users based on the codes assigned to your constituents. Be careful not to confuse this information with attributes. Use attributes to attach customized information to your records.

Entering Addresses

Making sure that addresses are properly entered in your database should be a top priority. A mistake in data entry with an address can mean the difference between a constituent receiving a thank-you letter for a large contribution, and the letter being sent to the wrong address, leaving a valued contributor feeling unappreciated. Before you begin entering addresses in your database, the supervisor must decide how addresses should appear. For example, if your organization uses a mailing service, you may be required to provide mail lists which conform to United States Postal Service address standards.

Mail converts your data into the appropriate format for exporting and mailing. However, you must still decide how you want addresses to be entered in your database. Creating a standard method of entering address information is imperative for maintaining consistency in your database, locating duplicate records, and receiving accurate results from queries. The supervisor will decide if you should use abbreviations, if you should enter the ZIP code plus four, and whether or not punctuation should be included in your addresses.

If you would like a guide for address formatting, the United States Postal Service provides a *Domestic Mail Manual* at their Web site at http://pe.usps.gov/. The online document is in Adobe PDF format so you can view and print it using the Adobe reader supplied with *The Raiser's Edge*. You can also order a copy from the United States Postal Service.

Divorced Constituents

To maintain consistency and ensure the effectiveness of appeals, your records should reflect married couples who divorce. If information for the spouse appears on the constituent record, but the spouse is not a constituent in your database, you must decide if you want to create a constituent record for the spouse or delete his or her information from your database. In most cases, you will probably want to create a constituent record for the spouse so you can continue to send appeals.

If both individuals are constituents in your database, you should break the link between their records. Select Divorced in the **Marital status** field of each of their constituent records. Link them on the Relationships tab as ex-wife or ex-husband if you want to track that information. We recommend you do so to keep your records complete as possible.

We recommend you update the address information for the couple immediately. It is also extremely important you check the addressee/salutations on each record and make any necessary changes to avoid embarrassing mistakes on mailings or during actions such as phone calls.

Deceased Constituents

If a constituent passes away, you must handle his record carefully. You do not want to unknowingly attempt to contact this individual. The Bio 1 tab of the constituent record contains a **Deceased** checkbox and a field in which you can record the date of death.

In *Configuration*, Business Rules, Constituent Rules, you can set a variety of rules for when you mark a constituent as deceased. These business rules enable you to automatically unmark the **Send mail?** checkbox for all the deceased's addresses. Additionally, you can specify options for automatically making the deceased's spouse a constituent and how to handle soft credits for the spouse.

You can also set an option so that when you mark a constituent deceased, after any other deceased options you have set are completed, and the constituent record is saved, the Update Spouse Addressee/Salutations screen appears so you can edit the addressee/salutations. Remember, it is very important that you change the addressee/salutation for the surviving member of the couple to avoid inappropriate or insensitive mailings.

You can also mark options under General Business Rules to exclude deceased constituents from mailings, reports, and exports. We strongly recommend you mark the option to exclude deceased constituents from your mailings to avoid potentially uncomfortable situations with your appeals and other mailings.

Inactive Constituents

Occasionally, you may decide to remove a constituent from your database. As an alternative, we recommend making the constituent inactive. An inactive constituent remains in your database for historic purposes, but does not appear in searches, and cannot be associated with any other records. If you decide to delete a record, we highly recommend you first print a profile listing all information available for the constituent.

Notepads

When creating a notepad, make sure you enter the date and your **Raiser's Edge** user name in the appropriate fields. Press **F5** on your keyboard to fill these fields automatically. Doing this makes tracking information in notepads more efficient. You can create various types of notepads, such as notepads for prospects or director's notes. You can run queries based on notepad entries and base security on notepad types.

General Maintenance of Constituent Records

Using a basic query and profile, you can report and list the data entered for all new constituents in the database. You should perform the following steps on a regular basis to check the accuracy of constituent biographical information entered into *The Raiser's Edge*. Create a dynamic constituent query using the criteria **Date added**. Select between as the **Operator** and select a time frame, such as the last two weeks, for entry of new constituents. Select a Sort criteria of **Last name** and an output of **Last name** and **Constituent ID**. Save the query under the name New Constituent Biographical Data Verification.

In the **Profiles, Lists, and Directories** link of *Reports*, select Constituent Profile. Select the New Constituent Biographical Data Verification query and print a profile for each new constituent. You can easily check the information on your new records from the printed profiles. Name and save the profile New Constituent Biographical Data Profile. Because the profile does not contain any date parameters, you can reuse it without making any changes next time you verify information for new constituents.

You can reuse the query simply by changing the values for the "between" operator to reflect current dates. Run this query and profile on a regular basis to make sure your new constituent records are consistent, accurate, and complete.

Constituent Batches

Using *Batch*, you can enter multiple constituents and gifts at the same time. We make several recommendations to help you save time and increase consistency when entering batches.

A default row appears in the batch data entry grid to speed data entry. We strongly recommend you change the color of the default row by selecting your color choice from the Color tab of User Options. This helps you differentiate the default row from the rest of the grid to avoid data entry errors.

In User Options, we also recommend you mark the **Automatically save batches on close** checkbox so each batch is automatically saved for historic purposes. We also highly recommend you mark the **Automatically save batches every [ ] minutes** checkbox and specify a time period no greater than five minutes in the accompanying field. Large batches can take quite a while to enter. By instructing **The Raiser's Edge** to save your batch, you ensure you lose no more than five minutes of work if your computer loses power or experiences network problems.

You can assign your own numbers to batches or use the sequential numbers automatically generated by **The Raiser's Edge**. Either way, the numbers must be unique. For consistency, we recommend you use the numbers supplied by the program. You cannot reuse a number even if you delete the batch associated with that number. We also recommend you always include a **Description** when you save a batch, so you can easily locate it.

To ensure you entered your data accurately and completely, we recommend you validate your batch before, or while you are committing it to the database. When validating, if the program finds more than one exception on a single row, it displays only the first exception in the grid. After you resolve the exceptions, we strongly recommend you validate the batch a second time to verify a single row does not have multiple exceptions.

If exceptions are created when you commit a batch, we recommend you print an exception report, correct the discrepancies and recommit the batch. Remember, if you mark the **Create constituent query of commited constituents** checkbox, the program includes only those constituents committed to the database. Any constituents not committed to the database, due to exceptions, are not included in the query.

When you create a batch, if you cannot complete the batch data entry for some reason, select **File**, **Save** from the menu bar. The data remains in the batch until you post or purge it, so you do not have to start from the beginning when you resume data entry. After you complete data entry, commit the batch.

Solicitors

A solicitor is a constituent in your database who is responsible for requesting contributions to you organization. In *The Raiser's Edge*, solicitors must be constituents, although not all your constituents will be solicitors for your organization. Solicitors are usually assigned to constituents with whom they have a relationship. For example, a solicitor who is a close friend of a constituent will probably be more successful securing gifts than a solicitor who has never met the constituent.

Associate solicitors with campaigns, funds, or any other goal category your organization establishes. Determine the goal amount each solicitor is responsible for, then assign your solicitors to constituents and actions to provide an organized means for solicitors to achieve their goals.

Once a constituent who has assigned solicitors contributes a gift, you can determine which solicitors receive credit for the gift and how much credit each solicitor should receive. Make sure gifts from constituents with assigned solicitors have the solicitor name included. Your Solicitor Performance Analysis reports will be incomplete and inaccurate if you leave the name off the gift.

Alumni Tracking

With *Alumni Tracking*, you can track all aspects of your organization's alumni. To speed data entry, we recommend you enter your organization's name as the default **School name** in the **Alumni options** of the **Business Rules** link in *Configuration*. Mark the **Set school name to** checkbox and enter your organization's name in the accompanying field. This makes the name automatically appear as the school name when you add a new education record from the **Constituents** link of *Records*. This is a default you can easily change, but it speeds data entry and helps you track your alumni more easily. You can add an education record for each degree a constituent earns, but only one can be the primary education record.

To promote consistency and avoid problems from incorrectly interpreting data, we recommend you set your **Class of format** to **YYYY** in Business Rules so the full four year date displays on your education records. To completely eliminate confusion and ambiguity, set the date format on the Date tab of the *Microsoft Windows* Regional Settings Properties screen to use four digits for the year.

Assign either a **Date left** or **Date graduated** for all your records. **Date left** indicates the constituent left your school before graduating. An entry in this field can be useful in avoiding the use of an addressee or salutation such as "Dear Graduate" for your constituents who did not complete a degree.

Event Management

In *Event Management*, you can plan all aspects of your events. Take these steps to promote consistency and thereby increase the accuracy and efficiency of record keeping for your events.

Use an annotation to attach a quick reminder to your event such as "This event starts tomorrow" or "Invitations have not been sent for this event." Display this note whenever the event record is opened to include important information each user who opens the event should know.

Before any gifts from event registrants, guests, or sponsors can be entered into *The Raiser's Edge*, the donor must first be entered into your database as a constituent.

Registrants, guests, and sponsors for your events are not required to be constituents in your database, but you can add them as constituents directly from the event record. We recommend you never assume a registrant, guest, or sponsor is not already a constituent. Always click the binoculars in the **Name** field to perform a search for the person before adding the record. By searching your database first, you ensure you are not creating a duplicate constituent record and help maintain consistency in your database.

To standardize your records, we recommend you add default benefits on the Prices tab of the event record. By doing so, you ensure that all participants who pay for an event receive the same benefits.

Membership Management

Control all facets of your memberships with *Membership Management*. Set up membership categories in *Configuration* to define the levels of giving necessary to qualify for membership in your categories or clubs.

When you drop a membership, the constituent is no longer considered an active member, but any past activity remains in your database for historic purposes. You can rejoin dropped members to make a membership current again.

Establish your membership programs, categories, and subcategories before you begin adding memberships. For consistency in your membership records, we recommend you let **The Raiser's Edge** automatically generate membership IDs.

Membership Categories

In the **Membership Categories** link of *Configuration*, define the giving amounts that make a constituent eligible for a certain level of membership. For example, at the level of $100, a constituent may be considered a Benefactor. You can then set a variety of defaults for renewals, benefits, actions, and entry of membership gifts for that category. Assigning categories to your memberships speeds data entry and reduces mistakes.

When you set up membership categories in *Configuration*, the **Auto Pick** button is enabled on individual membership records. Use this button to quickly and easily view all the available program/category combinations for a particular dues amount.

Honor/Memorial Tracking

Honor/Memorial Tracking helps you effectively manage your honor/memorial records in **The Raiser's Edge**. Access tribute information from the Honor/Memorial tab of a constituent record. This tab provides you the ability to track detailed information about donations given in honor, celebration, or memory of an individual or organization.

With *Honor/Memorial Tracking*, the Honor/Memorial tab appears on all your constituent records. From this tab, add tributes, edit tributes, and view gifts given to a tribute, depending on user rights established from the **Security** link of *Administration*. Notify an honoree when honor/memorial donations are received for the tribute. You can also notify family members, employees, and friends, as long as these acknowledgees are linked to the honoree as relationships.

The Raiser's Edge accommodates multiple acknowledgees and tribute types for your honor/memorial records. For example, you can have a tribute honoring Betty Smith for her volunteer work in the community. At the same time, you can have a tribute honoring the birth of her new son. To create tributes for a constituent, the constituent must first be marked as an honor/memorial.

Volunteer Management

With *Volunteer Management*, you can track all aspects of your volunteer workforce. You can enter the qualifications of your volunteers and assign jobs based on those qualifications. When adding jobs, we recommend you enter information into the **Job**, **Category**, **Start date**, **End date**, and **Position** fields. These fields are all used in search screens and as selection criteria for reports. So filling in the fields increases the versatility of your reports and searches.

We recommend you enter a **Volunteer type** on the Volunteer tab only if absolutely necessary. If a specific job can be filled by one of several different volunteer types, you can accidently eliminate qualified volunteers when automatically finding and assigning jobs. For example, if Robert's volunteer tab is marked as Medical staff, and you run the automatic **Find Volunteers** feature to locate callers for the Walk-A-Thon, Robert will be excluded from the search results. Enter Robert's medical information in the **Qualifications** section instead.

Prospect Research Management

Using *Prospect Research Management*, you can manage all types of prospect information. Track gifts made to other organizations by potential donors, gather financial information such as sources of wealth, annual income, and real estate holdings, and even obtain ratings from prospect research companies. Manage your organization's proposals, including amounts solicited, amounts funded, dates asked, and the status of the proposal. Use the Action tab of Prospect to maintain all meetings, phone calls, and correspondence with your potential donor.

Before you choose a prospect research company to handle your ratings, check the **Source** list on the Prospect tab to make sure *The Raiser's Edge* supports the company.

Gift Entry

The various gift entry guides contain detailed information about adding gifts in *The Raiser's Edge*. Setting up data entry protocols for entering gifts is vital to ensuring the consistency of your gift data. When you enter gifts consistently, you can easily retrieve accurate information from your database using queries and reports, and you ensure that all gifts are properly acknowledged. As discussed in the *Campaigns, Funds, & Appeals Data Entry Guide*, we strongly recommend you establish your campaigns, funds, and appeals before you begin entering gifts into your database.

Gift Types

We recommend you thoroughly discuss the different types of gifts and how you want to enter them with everyone who adds gifts to your database. If your gift entry is not consistent, your reports will not be completely accurate. For example, several donors may give computer equipment to your organization and different members of your staff may enter these gifts. If one person classifies the donation as a Gift-in-kind, while another classifies it as Other, you may have difficulty obtaining an accurate report for these gifts. To standardize gift entry, decide on a protocol for entering all types of gifts before you begin entering them into your database.

Gift Records

When entering information in the **Gift date** field, decide on a protocol for your organization, such as always using the date your organization receives a gift, to make this field meaningful. If some members of your staff use the date the gift arrived in your office, while others use the check date, you will not be able to accurately track your gifts and your acknowledgements could be adversely affected. After you save the gift for the first time, *The Raiser's Edge* tracks the date you added the gift to your database in the **Date Added** display on the bottom left corner of the Gift tab. The **Gift date** and the **Date Added** may be different, and that is fine. You want to be aware of the **Gift date** because reports, queries and exports are generated based on that date.

In the **Amount** field on the gift record, enter the total monetary value of the gift. The field is required, so you must enter an amount for the gift before you can save it. You can enter zero if necessary. For example, when entering a legacy gift, you may not know the value of the gift at the time of entry. When you add an Other gift, you can estimate the value of the gift for tracking purposes. Again, it is vital that your organization create a protocol for how you want to handle these situations. For example, you may want to put one person in charge of estimates, or have one person enter gifts that temporarily have a zero amount. That person should be responsible for tracking and updating those gifts.

Although you do not have to specify an appeal when you enter gifts, we recommend you always do so. You can then run a variety of summaries and reports to analyze the effectiveness of your appeals. We recommend adding an appeal titled Unsolicited so you can effectively track donations that are not made as a result of a specific appeal. Even though *The Raiser's Edge* gives you the ability to add campaigns, funds, and appeals directly from the gift record, we recommend adding them from the **Records** link so you can properly establish the record and set fund-raising goals.

On the Miscellaneous tab of the gift record, record a variety of information about a gift, such as a unique gift identification number or a gift code. You can create your own gift IDs, but for consistency, we recommend you let *The Raiser's Edge* automatically create an ID number each time you save a gift. To do this, mark the **Gift IDs** checkbox in the **Generate IDs** section of the **Business Rules** link in *Configuration*. This ID can be yet another useful tool for tracking and locating gifts.

We strongly recommend you add a constituent code to each gift you enter into *The Raiser's Edge*. A constituent code on the gift identifies the capacity in which the constituent donated the gift. For example, if a constituent record contains codes for Alumni, Board Member and Volunteer, and a gift comes in as a direct result of an Alumni mailing, you should tag the gift with the Alumni constituent code.

Anonymous Gifts

Decide how you want to handle anonymous gifts on your reports, and make sure your staff understands the procedure. You can select from several options on the Reports tab of User Options for how to display anonymous gifts. Be careful if you select Asterisk at end of line. Some reports, such as the Pledge Activity report, break down by constituent name, so if a constituent makes several pledges and one is anonymous, the gifts may be grouped inaccurately.

Pledges

When entering Pledges, decide on an installment schedule if the amount is not paid all at once. Also, decide how you want your organization to arrange these schedules; monthly is the most common arrangement. If a constituent pledges to give, but does not pledge a specific amount, you can enter zero in the **Pledge amt.** field. When the constituent donates the gift, you can update the **Pledge amt.** to reflect the actual value of the gift. Your organization should establish when and by whom it allows gift amounts of zero to be entered.

Acknowledgements

Acknowledging your gifts is vital to your continued fund-raising success. Use the **Acknowledge** field on all your gift records to make sure all gifts are acknowledged in some way. In this field, you can select an entry of Acknowledged, Not Acknowledged, or Do Not Acknowledge. In the accompanying field, enter the date a gift is acknowledged.

If you use *Mail* to generate the acknowledgement letter for a gift, it is very important you select Not Acknowledged as your entry in the **Acknowledge** field and leave the accompanying date field blank. If you select Acknowledged or Do Not Acknowledge, *Mail* assumes a letter has already been sent, and will not generate another. When you send acknowledgement letters through *Mail*, *The Raiser's Edge* automatically updates the **Acknowledge** field to Acknowledged and enters the date the letter was sent.

Receipts

Receipts are another important aspect of your gift entry. The **Receipt** field on the gift record functions much like the **Acknowledge** field, with the same ramifications in *Mail* if you select Receipted or Do Not Receipt. In the **Receipt amt/no.** field, we recommend you enter only the tax-deductible amount of a gift. For example, if a constituent donates $100 and receives a $10 coffee mug as a benefit for the donation, the **Amount** is $100 and the tax-deductible, or receipt, amount is $90.

We recommend setting two **Business Rules** in *Configuration* to help maintain consistency and accuracy for your receipts. You should specify that when you change a gift amount, *The Raiser's Edge* should automatically update the receipt amount; and when you save a gift, the receipt amount cannot exceed the gift amount. The first rule ensures that your receipts are updated and the second guards against data entry errors on receipts.

Gift Batches

You can enter multiple gifts simultaneously through *Batch*. Our recommendations for entering constituent batches also apply to gift batches.

Data Processing and Retrieval

The Mail, Reports, and Query & Export guides contain procedures for using the areas of **The Raiser's Edge** which gather and extract information from the program. As with entering data, you must be consistent in the ways you retrieve it to get the most out of the program.

Mail

A parameter file contains the settings for a particular mailing you design. We recommend you mark the **Automatically save mail parameters on close** checkbox on the Mail tab in User Options, so whenever you create a new mailing, the Save As screen appears so you can name and save it. We recommend you always name and save your mailings so you can reuse existing parameters instead of starting from scratch each time. Give your mailings unique descriptive names, because you will quickly have many of them.

> **Tip**: You can also quickly create certain types of letters directly from a constituent record. For more information, see the *Constituent Data Entry Guide*.

Remember, to use a letter as a mailing, it must first be written in your word processing program and linked to *The Raiser's Edge* through the **Letters** link of *Configuration*. For consistency, we recommend you process your pledge reminder letters at regular intervals, such as weekly or monthly. When you print receipts, we recommend you mark the **Exclude zero amount gifts** checkbox to avoid printing receipts for any gifts you may have entered as zero. You can exclude deceased constituents per individual mailing, or for all mailings from the **Business Rules** link of *Configuration*.

Query

Queries should not be used as reporting tools. Use queries to group records together and then use these groups in other functions such as reports, mailings, and exports. Always give your queries a descriptive name and save them. A descriptive name helps you identify the query when you have many of them saved in your database. Saving queries helps maximize your time because you can reuse a query instead of starting from scratch each time.

We recommend you mark the **Automatically save query parameters on close** checkbox on the Query tab in User Options. If you have not saved a query before, when you close it (whether or not it has been run), the Save As screen appears so you can name and save the query. If you already saved the query, any new parameters are automatically saved when you close.

We recommend you select Constituent as your **Default query type** and Dynamic as your **Default query format**. These are the most commonly used options. Constituent queries give you access to the all the fields in your database. Dynamic queries are automatically updated every time you use them.

When running queries, limit the number of output fields to only those that are necessary. The more output fields you select, the longer the query takes to process. We recommend you sort your queries using the **Last name** or **First name** fields. When creating queries, the blank operator is especially helpful in maintaining the consistency of your data entry by enabling you to see which records have empty fields. Before you delete a query, we recommend you back up your database in case you need to duplicate it later.

Reports

Mark the **Automatically save report parameters on close** checkbox on the Reports tab in User Options. Whenever you create a new report, the Save As screen appears so you can name and save it. If you previously saved the report, any changes are automatically saved when you close it, without the Save as screen appearing. We recommend you always name and save your reports so you can reuse existing report parameters. Give your reports unique names because you will quickly accumulate numerous saved reports.

Remember that a detail report includes information such as names and individual gifts, while a summary includes information based on your selections on the Format tab. To get the most out of your summaries in particular, it is important you fill in as many fields as possible on your records. For example, gifts must be linked with the correct solicitor for you to run an accurate Solicitor Performance Analysis, and fund goals must be established for you to run a Fund Performance Analysis.

Be careful when selecting how you want to credit matching gifts in your reports. If you elect to credit both the donor and the matching gift company, one gift appears twice on a report and the total gift amount may not be accurate.

Export

The export record, which contains all output and formatting choices for an export, can be customized, saved, and reused. We recommend you mark the **Automatically save export parameters on close** checkbox on the Export tab in User Options. If you have not saved an export before, when you close it (whether or not it has been run), the Save As screen appears so you can name and save the export. If you already saved the export, any new parameters are automatically saved without the Save As screen appearing. We recommend you always name and save your exports for future use. You should give your exports unique names and descriptions to make finding them easier.

Whenever you export to your word processor, print a control report listing the order of the exported fields. The report gives you the ability to verify the fields are in the correct order before you run a mail merge with your word processor.

If you frequently create exports using many of the same fields, add them to your favorite export fields to save time searching for them. If you are exporting data for a report or for updating, include a header in the export. This helps you eliminate confusion about the data the export contains.

Before you delete an export, we recommend you print a control report in case you ever need to duplicate a report or need the information from the export.

Importing & Housekeeping

All the functions contained in *Administration* have far reaching and serious implications. An inexperienced user can create severe problems in your database when using some of these functions. Therefore, we recommend only experienced users have access to *Administration*.

Import

Before importing new or updated records, you should back up your database. If an error or interruption occurs during importing, only a backup will restore your database to its original condition. If you are using *The Raiser's Edge* on a network, make sure all other users exit the program before you begin importing.

We recommend you mark the **Automatically save import parameters on close** checkbox on the Administration tab in User Options. If you have not saved an import before, when you close it (whether or not it has been run), the Save As screen appears so you can name and save the import. If you already saved the import, any new parameters are automatically saved without the Save As screen appearing. We recommend you always name and save your imports for future use.

On the General tab of the import record, you can select which numbers you want to use as import IDs. To promote consistency, we recommend you use the non-editable import ID automatically generated by *The Raiser's Edge*.

Always use your fastest computer to perform an import and close all applications except *Windows* and *The Raiser's Edge*. If you are using a standalone version of *The Raiser's Edge*, log off all networks before importing. The more record types you import the longer the import takes, so you should consider importing each record type separately.

Drop Lapsed Members

In *The Raiser's Edge*, you can easily drop memberships that have lapsed. **Drop Lapsed Members** offered in *Administration* can change the status of a group of lapsed memberships from lapsed to dropped in a few simple steps. This option drops memberships based on the membership expiration date and the **Drop this membership after being lapsed for** option set for each membership category in *Configuration*.

For example, in *Configuration* you set the Silver membership category to expire in one year, and you tell the program to drop memberships two months after the expiration date. Today is June 14, 2004, and Linda Kennedy became a Silver member on June 14, 2003. If you were to run **Drop Lapsed Members** today, using the date on or before June 1, 2004, Linda would not be dropped. She has not yet been lapsed for the two months as required based on your settings in *Configuration*.

You cannot globally drop a lifetime membership. You must drop lifetime memberships individually from the constituent record.

Globally Delete

The **Globally Delete Records** function removes selected data from a selected group of records in your database. For example, if your organization held a golf tournament fund-raiser for several years, but now decides to discontinue the event and wants to remove it from all records in its database, you can use **Global Delete Records** to remove the event.

Changes, however, must be made by record type. For example, to delete the golf tournament event from constituent records, event records, and action records, you must run three separate global deletes. You can globally delete records only if you are assigned the proper security privileges. Security is established from the **Security** link accessed through the Administration page

You can generate a control report and preview a list of records affected by the global delete process. You can also generate queries. If you create a query of records included in the global delete, you can use the query in other functions of **The Raiser's Edge**, such as *Mail* or *Reports*. An exception query contains the records that cannot be deleted.

Before you globally delete data, or any records in **The Raiser's Edge**, you should have a complete backup of your database. To successfully back up your data, you must first shut down the database.

Please be aware, you cannot recover deleted records. They are permanently removed from your database

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