

The Raiser's Edge™

Regular Supporters Implementation Guide

020112

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What Is In This Guide?



In the *Regular Supporters Implementation Guide*, you learn how to use **The Raiser's Edge** to help manage your regular supporters program. This guide provides an overview of the areas of the program to which you should pay special attention. You can learn about the following:

- “Electronic Funds Transfer” on page 3
- “Electronic Funds Transfer Setup” on page 6
- “Recurring Gifts” on page 21

How Do I Use These Guides?

The Raiser's Edge user guides contain examples, scenarios, procedures, graphics, and conceptual information. 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.

Regular Supporters Implementation



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Perhaps the most valuable donors to your organization are not the ones who give a sizeable amount once, but those who are committed givers — your regular supporters who give on a recurring basis, often monthly, by direct debit or credit card. Many donors feel they can make a more substantial gift if they can budget their payments to your organization, and you need to accommodate their needs. These committed donors are the ones who help you maintain your giving levels, make it possible for you to continue to invest in long-term projects, and make new meaningful plans.

Note: You may call the donors who give regularly to your organization by different names. In this guide, we call them “regular supporters.” You may call them, for example, “regular givers,” “regular donors,” “committed givers,” or “committed donors.” No matter what you call them, these faithful supporters can bring in a lot of income for your organization! For more information about this cost-effective fundraising strategy, log into www.blackbaud.com. Under **Nonprofit Resources**, select **White Papers**. Click the **Implementing a Recurring Gift Program** link.

When you have a regular supporters program, many challenges exist. You must maintain recurring gifts. You must be able to accept donations electronically. You constantly strive to keep these donors committed, attract new donors, increase your numbers and amounts of donations, and communicate effectively to the donors about where their money is going. You also need to report internally on how your programs are doing, how many donors you have lost, and how many have upgraded their donations. It is also helpful to analyze demographical statistics, so you know who you need to target and why. *The Raiser’s Edge* helps you manage your regular supporters program by giving you the tools you need to help recruit, maintain, process, and analyze your regular supporters.

This guide, while not a complete start-to-finish guide on regular giving, gives you an idea of how you can use *The Raiser’s Edge* to help manage your regular supporters program. This guide provides an overview of those areas of the program to which you should pay special attention.

Electronic Funds Transfer

Electronic Funds Transfer (EFT) makes giving a simple choice for your regular supporters. With *Electronic Funds Transfer*, you offer your donors the ability to contribute electronically to your organization by direct debit from their bank accounts or by credit card. Using *Electronic Funds Transfer*, you benefit from reduced paperwork and postage costs, plus regular electronic giving means no forgetful donors! To learn about *Electronic Funds Transfer* in its entirety, we recommend you read the *Electronic Funds Transfer (EFT) Guide*.

In this Electronic Funds Transfer section of the guide, we mention both recurring gifts and pledges. Some of you may still be using pledges for your regular supporters’ EFT gifts. However, we encourage you to use recurring gifts, as they are better suited for regular giving. A recurring gift can be open-ended. When you set up a schedule, you do not have to specify an end date or a set number of transactions, even though you can. When a donor decides not to specify an end date for a donation, he can still feel very much in control of his donation because he has the freedom to upgrade or downgrade the donated amount, and skip payments, when necessary. On a recurring gift template, you can easily amend the gift and keep track of the upgrade or downgrade, the amendment amount, amendment date, and variance between the original recurring gift amount and the newly amended gift amount. You can easily skip transactions when a donor asks you to do so. You may be able to attract more regular supporters by using recurring gifts because the recurring gift allows your donors more flexibility in giving. For more information about recurring gifts, see “Recurring Gifts” on page 21.

Quick Look into EFT Processing

When you receive gifts donated by direct debit or credit card, you can process the transactions using an electronic funds transfer. In a nutshell, the steps below outline the steps involved in processing EFT gifts in *The Raiser’s Edge*. Because *Electronic Funds Transfer* adds so many additional features to *Batch*, we recommend you read the *Batch Guide* before reading the *Electronic Funds Transfer (EFT) Guide*.

- In *Batch*, using the **Automatically Generate Transactions/Payments** menu option, you automatically generate payments (gift records) for selected recurring gifts or pledges that require electronic processing through direct debit or credit card. You automatically generate these electronic payments through a gift batch. The program creates a payment entry for each eligible recurring gift transaction or pledge installment due within the gift batch you use. For detailed information and procedures about automatically generating transactions/payments, see the Automatically Generating Recurring Gift Transactions and Pledge Payments in Batch section of the *Electronic Gifts (EFT) Guide*.
- In *Batch*, using the **Create EFT Transmission Files** menu option, you create direct debit transmission files to send to your organization's bank or to process through IATS.
- In *Batch*, using the **Create EFT Transmission Files** menu option, you create credit card transmission files to process through IATS or ICVerify. IATS and ICVerify work with *The Raiser's Edge* to process credit card transactions your organization receives, and directs those transactions to the appropriate financial institution for processing. For detailed information and procedures about creating and sending transmission files, see the Creating Transmission Files section of the *Electronic Gifts (EFT) Guide*. For information about credit cards, see the Credit Card Transmission Files section.
- In *Batch*, you track the acceptance or rejection code for transactions in a gift batch. For more information, see the Creating Transmission Files section of the *Electronic Gifts (EFT) Guide*.
- In *Batch*, you can commit the gift batch with or without *Electronic Funds Transfer*. For more information about committing a gift batch to the database, see the Committing a Batch section in the Gift Batch chapter of the *Batch Guide*.

Preparing for Direct Debits and Credit Cards

Before you begin processing transactions with *Electronic Funds Transfer*, you must first obtain a few pieces of information to get started. The following sections outline the information you need to begin preparing your organization for electronic processing.

Preparing for Direct Debits

Direct debit is the simplest way for your organization to collect payments from regular supporters. It saves time, reduces the cost of collections, and puts cleared funds directly into your bank account. Direct debit is an electronic payment method. It is an instruction from a constituent to his bank authorizing your organization to collect varying amounts from his account, at set intervals.

When you use the **Automatically Generate Transactions/Payments** menu option in a batch, you must mark **EFT?** on the gift record to include Direct Debit transactions. You can create a direct debit transmission file of your direct debit gifts to send to your organization's sponsoring bank or to process through IATS.

Before you begin processing direct debit payments for a gift batch, follow these tips to help you get started:

- ☐ Obtain your immediate destination number and transit/routing number. The immediate destination number is the eight-digit identification number that represents the authorizing institution you enter in the **Immediate destination name** field for your transmission files. You enter your immediate destination number in the **Immediate destination** field on the General page of *Configuration*. The transit/routing number is stored on your sponsoring bank's financial institution record, added on the Financial Institutions page of *Configuration*.
- ☐ Establish your company ID. Your company ID appears as an identifying part of your transmission files. You enter your company ID in the **Company ID** frame on the General page of *Configuration*.
- ☐ If you process your direct debit transactions through your sponsoring bank, check with your bank to find out whether to mark **Create credit offset transaction** on the Create Transmission Files screen when you create direct debit transmission files. A credit offset transaction is the transaction crediting your organization's account for the money debited from the donors' accounts. When you mark this checkbox, the credit offset transaction is included in the transmission file. As some banks generate this transaction themselves, be sure to check with your sponsoring bank.

- ☐ If you use IATS, to authorize and process direct debit transactions in **The Raiser's Edge**, you do not need to install additional software. Simply set up an account with IATS, set a few options in *Configuration*, and begin to create direct debit transmission files in *Batch*. For more information about IATS, see "IATS" on page 5.
- ☐ Encourage your donors to sign up for direct debit giving.
- ☐ Create new recurring gifts and pledges and mark the **EFT?** checkbox on the gift record.

Preparing for Credit Cards

When using a credit card, donors usually give a one-off gift. A credit card is used as a convenience and often to give a donation on impulse. But, given the choice, a donor may want to give a regular donation by credit card. You can use *Electronic Funds Transfer* to process credit card transactions on a regular basis. **The Raiser's Edge** can interface with either IATS or *ICVerify* to authorize and process credit card gifts included in your transmission files.

To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), the program immediately sends new or edited credit card information to the Blackbaud *Payment Service* when you leave the modified row in the batch. Depending on your Internet connection, you may experience a slight delay. In your database, **The Raiser's Edge** stores the reference token used to identify the credit card number in the Blackbaud *Payment Service*. On the record and in the batch, the **Credit Card No.** displays a masked credit card number, with only the last four digits visible.

The Raiser's Edge requires Internet access to connect to the Blackbaud *Payment Service*. If **The Raiser's Edge** cannot connect to the Blackbaud *Payment Service*, a message appears. Click **OK** and check your Internet connection. If you cannot restore your Internet connection, you can click the "X" in the upper right corner to close the batch without saving.

IATS

You can use IATS, to authorize and process credit card and direct debit transactions in **The Raiser's Edge**. You create transmission files in *Batch* to send to IATS for authorization and processing. To create transmission files in *Batch*, you can use the **Create EFT Transmission Files** menu option from the **Tools** menu.

To process your direct debit or credit card gifts, you do not need to install additional software. You simply need to set up an account with IATS, set a few options in *Configuration*, and begin to create transmission files in *Batch*.

Before you begin to process direct debit or credit card transactions, follow these tips to help you get started with IATS.

- ☐ You must have Internet access. The IATS Web site works best with Microsoft *Internet Explorer*, version 5.0 or higher. A modem or Internet access speed of 28.8 baud or better is recommended.
- ☐ To set up an account, contact IATS. You can contact them by telephone at 604-682-8455 (toll free at 1-866-300-4287); fax at 310-734-0794. To set up an account, you can also follow the steps listed at <http://www.iatspayments.com/SetupDocs/BBNSNC/bb.html>. IATS supplies you with its own merchant account numbers.
- ☐ Following the steps outlined in the previous link, you must sign and return the IATS Merchant Account Program Agreement form, the IATS agreement form, and Schedule A to the Merchant Application and Agreement, along with a copy of a voided check for deposit information. You must also provide a copy of your 501c3 confirmation letter or your IRS notification of tax exemption. Finally, you must submit the last 2-3 months of credit card processing statements from your previous processor. You must fax all of this information to 310-734-0794.
- ☐ To begin processing, IATS sends you a confirmation by fax, which includes the necessary user code (login ID) and password. Within 4 business days of receiving your signed agreement, IATS can provide full merchant capability for direct debit transactions and all major debit and credit cards.

Note: IATS supplies you with a login ID applicable to the specific country for which you are setting up an account. For example, a typical login ID for the United States may be 3A35546. The first character in the login ID, 3, designates the account may be used to process credit cards issued by financial institutions in the United States.

- ❑ Once you set up your account with IATS to process direct debit or credit card gifts, set up your account information on the Business Rules page of *Configuration*. From the tree view, select **Batch options**. Select “IATS/Other” in the **Process credit cards and ACH gifts through** field and click **Click here to set up merchant accounts**. The Business Rules page for merchant accounts appears. From the **Merchant Accounts for authorizing credit cards and ACH gifts** grid, you can add the merchant account. With the merchant account, *The Raiser’s Edge* automatically interfaces with the IATS authorization service to process the direct debit gifts you include in your transmission files or uses the Blackbaud *Payment Service* to interface with the IATS authorization service to process your credit card gifts.

ICVerify

ICVerify is a software program that works with *The Raiser’s Edge* to authorize your organization’s credit card transactions. You must purchase *ICVerify*. For more information about how to purchase and install *ICVerify*, and its role in the transaction process, call 1-800-538-0651. You can also visit www.icverify.com.

When you receive *ICVerify*, you must install the software on your computer. A wizard guides you through the installation. During the installation, enter the new merchant account numbers and third-party processing information given to you by your bank. For more information about merchant account numbers and third-party processors, contact your bank. For more information, also see the New Merchant Account Numbers and Third-Party Processors section in the *Electronic Funds Transfer (EFT) Guide*.

You can create credit card transmission files in *Batch* to send to *ICVerify* for authorization and processing. To secure credit card information included in transmission files, *The Raiser’s Edge* uses the *ICVerify EncryptionManager* utility. To create credit card transmission files in *Batch*, you select the **Create EFT Transmission Files** menu option from the **Tools** menu. When you create a credit card transmission file from *The Raiser’s Edge*, you should already run the *ICVerify* software on your computer. Once you use the optional module *Electronic Funds Transfer* to create the encrypted transmission file, *ICVerify* takes that file and either authorizes or rejects the transactions in the transmission file. Authorized transactions are settled and the funds from the transaction are deposited into your organization’s bank account.

If you choose to use *ICVerify* without the optional module *Electronic Funds Transfer*, be aware of the guidelines for using *ICVerify*. For more information, see your *ICVerify* user guide.

Before you begin to process credit cards, follow these tips to help you get started with *ICVerify*.

- ❑ Purchase *ICVerify*. For more information about how to purchase and install *ICVerify*, and its role in the transaction process, call 1-800-538-0651. You can also visit www.icverify.com.
- ❑ Install *ICVerify*. For more information about installing, see your *ICVerify* user guide.
- ❑ Once you set up your account with *ICVerify*, on the Business Rules page of *Configuration*, set up your credit card authorization program information. From the tree view, select **Batch options**. In the **Process credit cards and ACH gifts through** field, select “ICVerify”.
- ❑ Once you set up your credit card authorization program information in *Configuration*, you need to enter user option information on the File Locations tab of the Options screen. For more information about setting user options, see “User Options” on page 13.

To learn about *Electronic Funds Transfer* in its entirety, see the *Electronic Funds Transfer (EFT) Guide*.

Electronic Funds Transfer Setup

Before you begin processing EFT gifts, you must complete several areas of *The Raiser’s Edge* to properly set up *Electronic Funds Transfer*.

Configuration - General Page

On the General page of *Configuration*, you enter basic information such as your organization's address and phone number, and specify when your organization's fiscal year ends and when your volunteer year starts. When you use *Electronic Funds Transfer*, the **Immediate destination** field and **Company ID** frame appear. The information you enter in the **Immediate destination name** field designates the authorizing institution that approves and authorizes all banking account transactions. Federal Reserve is typically entered in this field, as this is the institution that approves most financial transactions for US banks. However, if your bank serves as your financial approval institution, you can enter the bank name in this field. The information you enter in the **Company ID** frame appear as identifying parts of your direct debit and credit card transmission files.

The screenshot shows the 'Configuration - General' page in 'The Raiser's Edge' software. The page is titled 'Blackbaud Demo'. On the left is a navigation pane with icons for Home, Records, Query, Export, Reports, Mail, Batch, Admin, Config, Scanning, NetSolutions, and Dashboard. The 'Config' icon is selected. The main area is divided into two sections: 'Configuration' and 'General'. The 'Configuration' section has a sub-menu with 'General' selected. The 'General' section contains the following fields:

- Country: United States (dropdown)
- Fiscal year ends: December (dropdown)
- Address: 2000 Daniel Island Drive
- City: Charleston
- State: SC (dropdown) South Carolina
- ZIP: 29492
- Phone: (800) 468-8996
- Volunteer year starts: 01/01
- Immediate destination: 52002169
- Company ID frame:
 - ☒ Federal Tax ID
 - ☐ User defined
 - ID: 15-043816

At the bottom, there is a 'General' section with a description: 'Use the General page to enter basic information, such as your organization's address and phone number'.

- On the Raiser's Edge bar, click **Config**. The Configuration page appears. Click **General**. The General page appears. In the **Immediate destination** field, enter the eight-digit identification number that represents the authorizing institution you enter in the **Immediate destination name** field on the Create Transmission Files screen in *Batch*. For example, if you enter "Federal Reserve" in the **Immediate destination name** field for a transmission file, you must enter the eight-digit identification number for the Federal Reserve in the **Immediate destination** field here in *Configuration*. If you are unsure of the information that should be entered in this field, contact your sponsoring bank. For more information about the **Immediate destination name** field, see the Creating Transmission Files section of the *Electronic Gifts (EFT) Guide*.

Note: Your accountant or primary financial institution can supply you with your Federal Tax ID number.

- On the General page in *Configuration*, the **Company ID** frame also appears as part of direct debit and credit card transmission files. In the **Company ID** frame, mark either the **Federal Tax ID** or **User defined** option. In the **ID** field, you can enter a maximum of nine letters or numbers to be used as your organization's ID in a transmission file. When you mark the **Federal Tax ID** option, the number 1 precedes the information in the **ID** field and appears in the transmission file. When you mark the **User defined** option, the number 9 precedes the information in the **ID** field and appears in the transmission file.

Configuration - Financial Institutions

On the Financial Institutions page of *Configuration*, you add bank information for your organization, and designate which banks or branches are “sponsoring banks”. When you mark the **Sponsoring Bank** checkbox, you indicate that a bank or branch transfers funds electronically through direct debit. You can also add constituent banks on the Financial Institutions page. Banks defined here can be assigned to gifts to provide details on where money is coming from or to constituents as relationships. Also, new banks added from constituent records appear on the Financial Institutions page.

- On the Financial Institutions page of *Configuration*, you can add a new bank or financial institution. On the Raiser’s Edge bar, click **Config**. The Configuration page appears. Click **Financial Institutions**. The Financial Institutions page appears. On the action bar, click **New Financial Institution**. For detailed information about adding, editing, and deleting financial institutions from the Financial Institutions page, see the Financial Institutions section in the Configuration chapter of the *Configuration & Security Guide*.

American Savings and Loan - First Union Federal

File Edit View Branch Help

Save and Close

Bank: American Savings and Loan

Branch: First Union Federal

Country: United States

Address lines: 2261 Baylor Rd.
Union Square

City: San Francisco

State: CA California

ZIP: 94125

Region: Pacific

☒ Sponsoring Bank

Account name: Business Checking Account

Account number: 123456789

User number: 8888

Electronic Transfer Information

Transit/Routing no.: 00044444

Immediate origin: ☒ Use Transit/Routing no.
☐ Other

Notes:

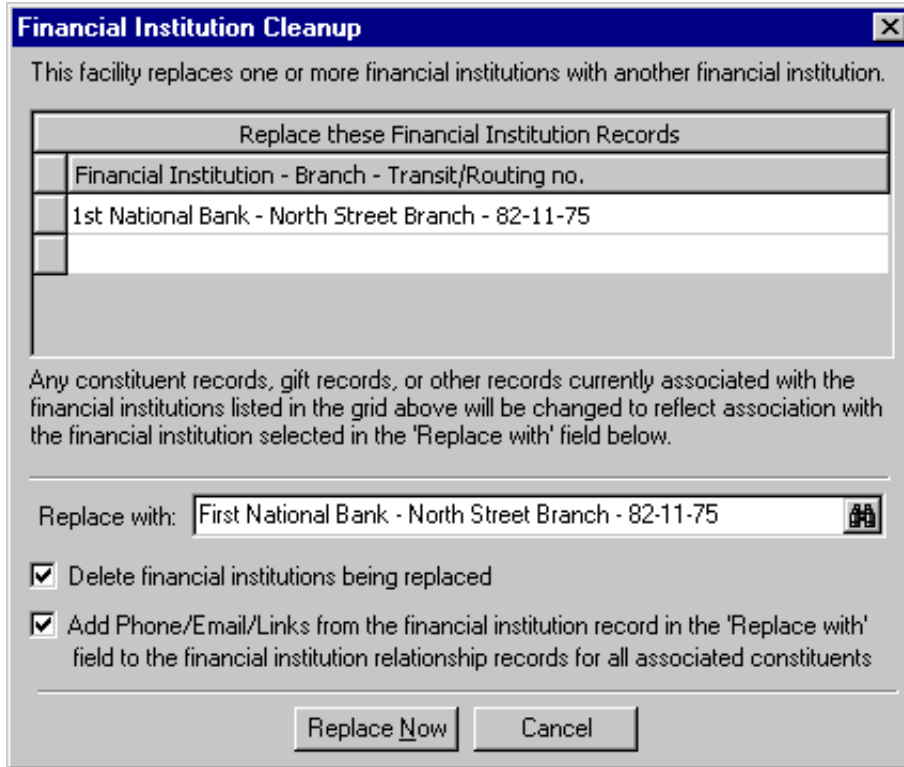
For questions about our EFT accounts, contact Leonard Harrison, the branch manager.

Phones/Email/Links		
DNC	Type	Number/Email Address
	Bank	650-555-7300
	Fax	650-555-7401

Note: The Financial Institution Cleanup wizard is excellent for combining banks, as well. For example, if Bank of Washington merges with Capitol Bank to form the new Constitution Bank, you can replace both Bank of Washington and Capitol Bank with the newly formed Constitution Bank on all your constituent and gift records.

- If you have duplicate financial institution records in your database, you can use the Financial Institution Cleanup wizard to correct the problem. On the Financial Institutions page, click **Financial Institution Cleanup** on the action bar. Using the Financial Institution Cleanup wizard, you can select one or more financial institutions and replace them with the correct financial institution. For example, in your database, you notice that First National Bank has also been entered as 1st National Bank, and this bank appears on constituent and gift records both ways. You can use the Financial Institution Cleanup wizard to get rid of the incorrect duplicate, 1st National Bank, and replace it with First National Bank. First National Bank will then appear

correctly on all associated gift and constituent records. You can also update all phone numbers, email addresses, and other links on the corrected financial institution relationship record. The Financial Institution Cleanup wizard will not change any account numbers. For detailed information about using this wizard, see the Cleaning Up Financial Institutions segment in the Financial Institutions section in the Configuration chapter of the *Configuration & Security Guide*.



Financial Institution Cleanup [X]

This facility replaces one or more financial institutions with another financial institution.

Replace these Financial Institution Records	
<input type="checkbox"/>	Financial Institution - Branch - Transit/Routing no.
<input type="checkbox"/>	1st National Bank - North Street Branch - 82-11-75
<input type="checkbox"/>	

Any constituent records, gift records, or other records currently associated with the financial institutions listed in the grid above will be changed to reflect association with the financial institution selected in the 'Replace with' field below.

Replace with: [Add]

☒ Delete financial institutions being replaced

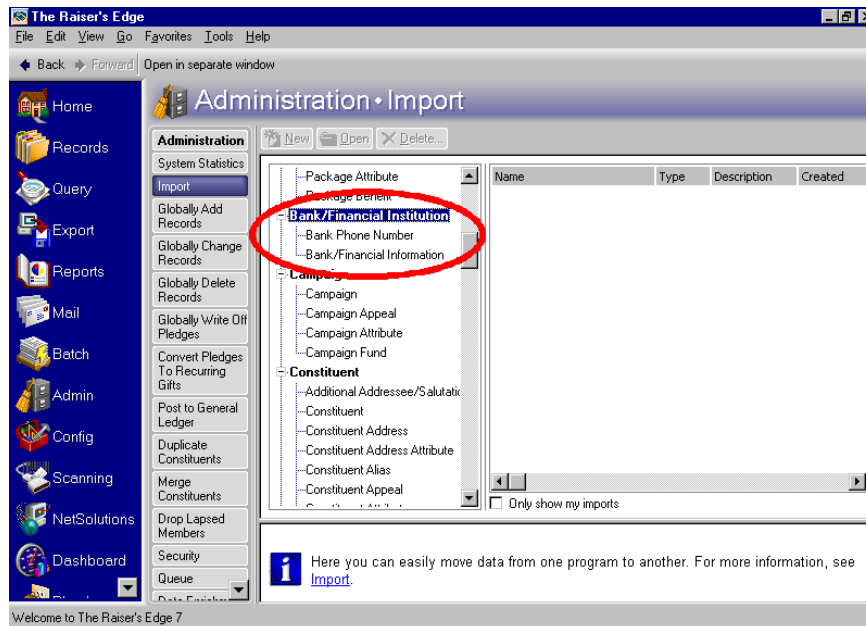
☒ Add Phone/Email/Links from the financial institution record in the 'Replace with' field to the financial institution relationship records for all associated constituents

[Replace Now] [Cancel]

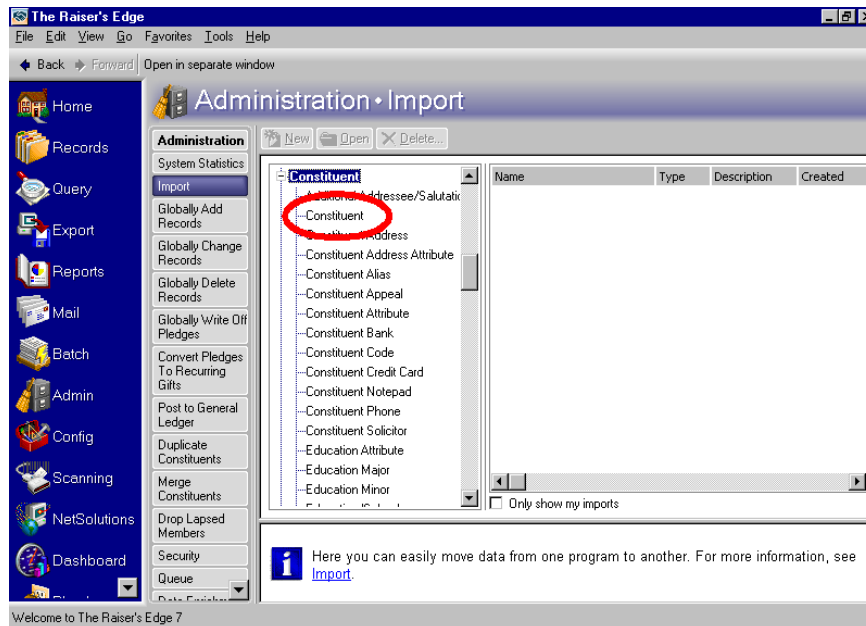
Import - Importing Bank/Financial Institution Information

On the Import page of *Administration*, you can import bank information into your database. On the Raiser's Edge bar, click **Admin**. The Administration page appears. Click the **Import** button or link. The Import page appears. All import types appear in a tree view on the left side of the screen. Information appearing on the right side of the screen depends on the import type you select on the left side and if you have a corresponding import type saved. To create a new import, select the import type you want to create, and click **New** on the action bar. To open an existing import, select the import and click **Open**. The Import screen appears. For detailed information about importing new records into *The Raiser's Edge*, importing updates to existing records in *The Raiser's Edge*, and creating an import file of records in your *Raiser's Edge* database to use in another application, see the *Import Guide*.

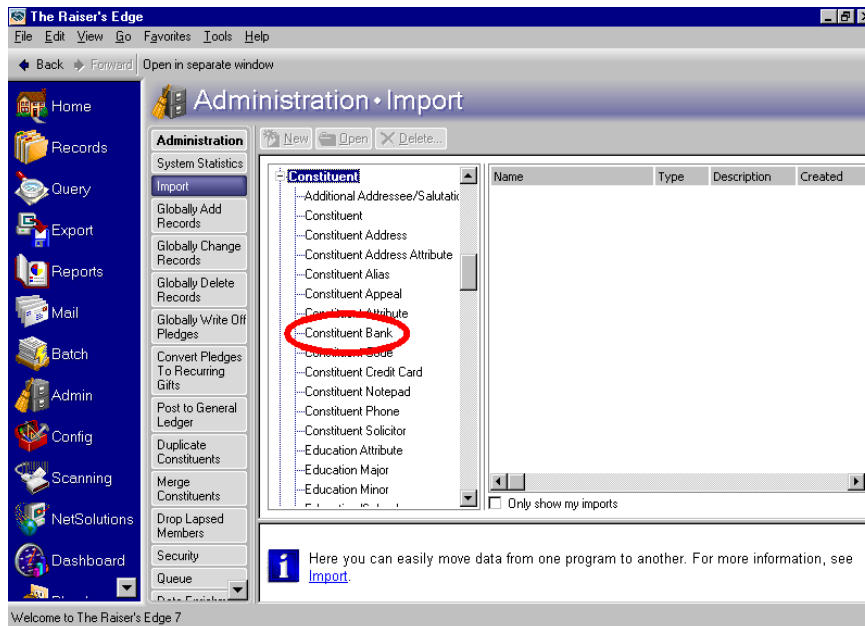
- ❑ In **Import**, under **Bank/Financial Information** in the tree view, using the **Bank/Financial Institution** import type, you can import new bank records or import updates to existing bank records in your database. Using the **Bank Phone Number** import type, you can update or create bank telephone information.



- ❑ In **Import**, under **Constituent** in the tree view, using the **Constituent** import type, you can import new bank records or import updates to existing bank records in your database in the same import file you use to import new individual constituent records or update existing individual constituent records. You can use a single flat file to import all this information. This feature can be beneficial if you receive import files with this type of information from outside agencies or organizations.



- ☐ In **Import**, under **Constituent** in the tree view, using the **Constituent Bank** import type, you can import new bank records and their addresses or import updates to existing bank records for existing individual constituent records in your database.



Configuration - Business Rules

On the Business Rules page of *Configuration*, you can select to have a warning message appear if a constituent has an outstanding recurring gift or pledge payment when adding a gift to a batch and set up your credit card authorization program.

Batch Options

Note: You can also select to have a warning message appear when a constituent has an outstanding recurring gift or pledge payment when you add a recurring gift or pledge from *Records*. On the Business Rules page, under **Gift options**, select **Activity options**. Under **When adding a gift warn if constituent has**, mark the **Outstanding pledge balances** and **Outstanding recurring gifts** checkboxes.

- ☐ On the Business Rules page, from the tree view, select **Batch options**. Under **When adding a gift to a batch, warn if constituent has**, mark the **Outstanding pledge balances** and **Outstanding recurring gifts** checkboxes. When you add recurring gifts and pledges to a batch, a warning appears if any of these gift types are due, and asks if you want to apply the gift to the recurring gift or pledge. You can also mark the **Outstanding registration fees** and **Lapsed membership** checkboxes. For more information about Batch options business rules, see the Business Rules section in the Configuration chapter of the *Configuration & Security Guide*.

When adding a gift to a batch, warn if constituent has...	
<input checked="" type="checkbox"/>	Outstanding pledge balances
<input checked="" type="checkbox"/>	Outstanding recurring gifts
<input type="checkbox"/>	Outstanding registration fees
<input type="checkbox"/>	Lapsed membership

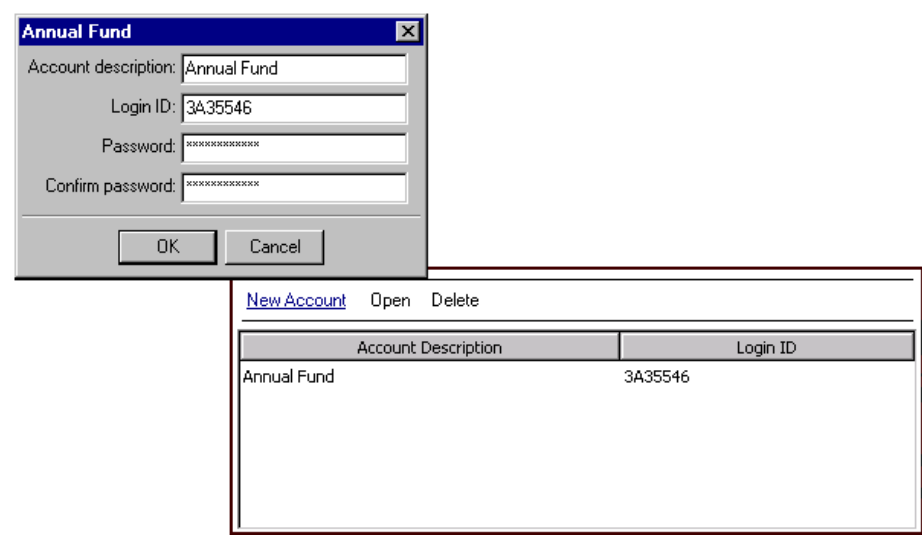
Note: You must contact IATS to set up an account. You can contact them by telephone at 604-682-8455 (toll free at 1-866-300-4287) or fax at 310-734-0794. IATS supplies you with its own merchant account numbers.

- On the Business Rules page, from the tree view, select **Batch options**. In the **Process credit cards through** field, you can select “ICVerify” or “IATS”. When you select “ICVerify”, you must then go to User Options, select the File Locations tab, and enter an ICVerify Data Path. For more information about setting up this user option, see “File Locations Tab” on page 15.

When you select “IATS”, the corresponding grid and action bar buttons are enabled. Under **When authorizing credit cards**, in the grid, you can set up account descriptions, login IDs, and passwords for each IATS account to which credit card transactions will be directed when you create credit card transmission files. IATS uses a standard in assigning the login ID that identifies the country for which an account is valid. For example, a typical login ID for an account valid in the United States begins with 3, designating the account is valid for processing credit cards issued in the United States.

Note: A login ID for Canada begins with 2; Australia, A; and New Zealand, N.

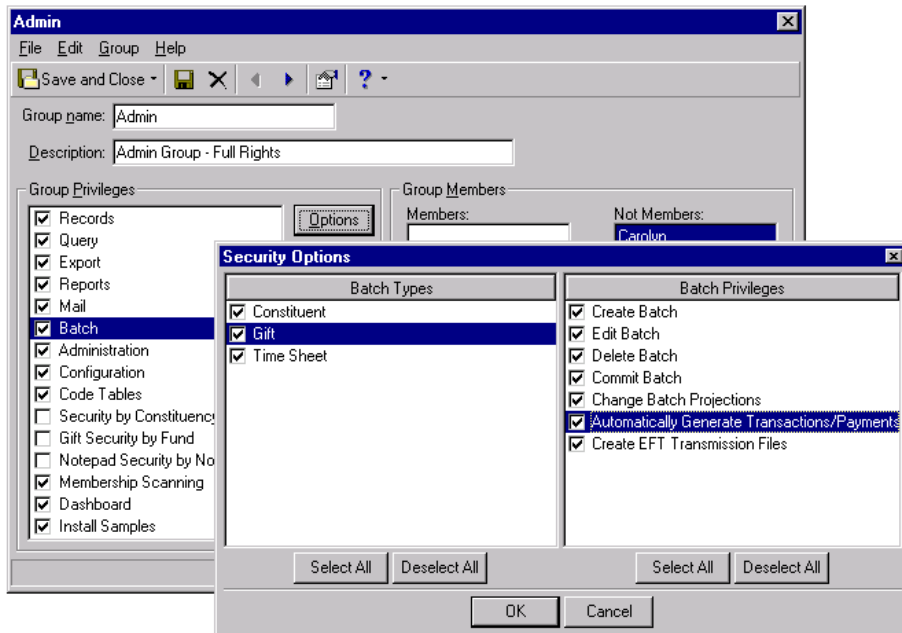
To add a new account, click **New Account** on the action bar. The Add Account screen appears so you can designate an account description, login ID, and password. When you click **OK** on this screen, the account description and login ID default into the grid. *The Raiser’s Edge* integrates with IATS when creating transmission files with (or without) *Electronic Funds Transfer*. For detailed information and procedures about creating and sending transmission files, see the Creating Transmission Files section of the *Electronic Gifts (EFT) Guide*. For information about credit cards, see the Credit Card Transmission Files section. For more information about Batch options business rules, see the Business Rules section in the Configuration chapter of the *Configuration & Security Guide*.



Administration - Batch Security

When you assign security for gift batches, you can also assign rights to perform functions in *Electronic Funds Transfer*.

- ❑ On the Raiser's Edge bar, click **Admin**. The Administration page appears. Click **Security**. The Security page appears. To create a new group or edit an existing group, on the action bar, click **New Group** or select an existing group, and click **Open**. On the Group screen, in the **Group Privileges** box, mark **Batch**. Click the **Options** button. The Security Options screen appears. In the **Batch Types** box, mark **Gift**. In the **Batch Privileges** box, you can mark **Automatically Generate Transactions/Payments** and **Create EFT Transmission Files** to give users rights to perform these functions in *Electronic Funds Transfer*. For detailed information about security in *The Raiser's Edge*, see the Security chapter of the *Configuration & Security Guide*.

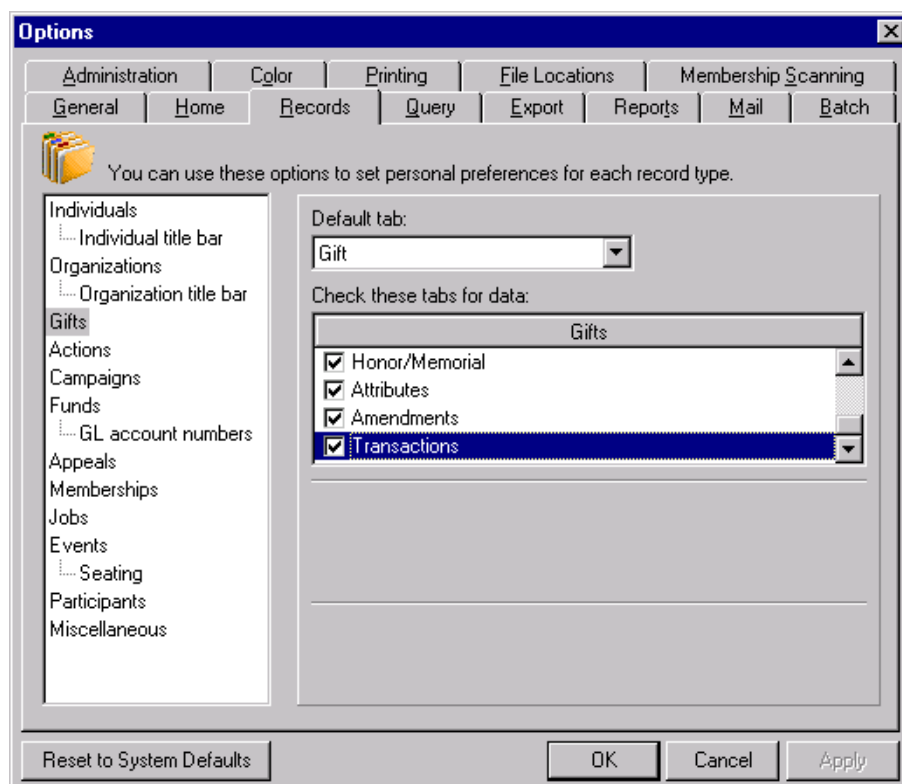


User Options

User options are preferences you set that affect how *The Raiser's Edge* looks and runs on any workstation you are using. User options are login-specific, which means that if you log into a workstation using your password, your preferences are active on that workstation. When you log off that workstation, your preferences are not active for any other user. You can establish user options that help with your EFT processing. For information about all user options, see the User Options chapter of the *Program Basics Guide*.

Records Tab

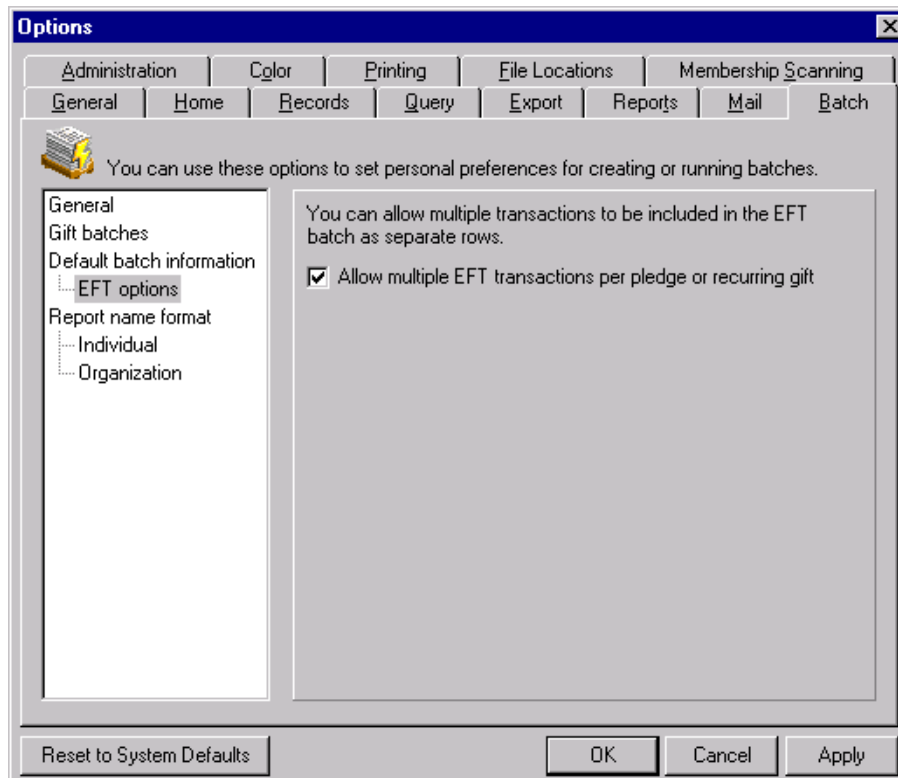
- ❑ On the Records tab of User Options, you can select to have a check mark appear on the tabs of a gift record when they contain data. When processing recurring gift transactions and pledge installments with *Electronic Funds Transfer*, you may want to set this user option so you can readily see if any recurring gift transactions or pledge installments exist on a recurring gift or pledge. From the menu bar on the shell of **The Raiser's Edge**, select **Tools, User Options**. The Options screen appears. Select the Records tab. From the tree view on the left, select **Gifts**. The Gift user option selections appear on the right. In the **Gifts** box, under **Check these tabs for data**, mark the checkboxes by **Transactions** and **Installments/Payments**. A check mark will now appear on the Transactions tab of your recurring gift records or the Installments/Payments tab of your pledge gift records when they contain data.



Batch Tab

- ❑ On the Batch tab of User Options, you decide whether or not you want multiple recurring gift transactions or pledge payments to be generated in a batch for a single recurring gift or pledge. For example, you have not generated recurring gift transactions for the past month. When you generate transactions, four transactions for a single weekly recurring gift need processing. When you mark the **Allow multiple EFT transactions per pledge or recurring gift** user option, all four transactions can be processed in one batch. If you do not set this user option, only the first transaction due will be included for processing in your batch.

From the menu bar on the shell of *The Raiser's Edge*, select **Tools, User Options**. The Options screen appears. Select the Batch tab. From the tree view on the left, under **Default batch information**, select **EFT options**. *Electronic Funds Transfer* user options appear on the right. To allow more than one EFT transaction to be generated at one time for a recurring gift or pledge, mark the **Allow multiple EFT transactions per pledge or recurring gift** checkbox. If you do not mark this checkbox, a transaction must be authorized and committed before you can generate the next transaction for a recurring gift or pledge. For more information about generating transactions with *Electronic Funds Transfer* and this particular user option, see the *Electronic Funds Transfer (EFT) Guide*.

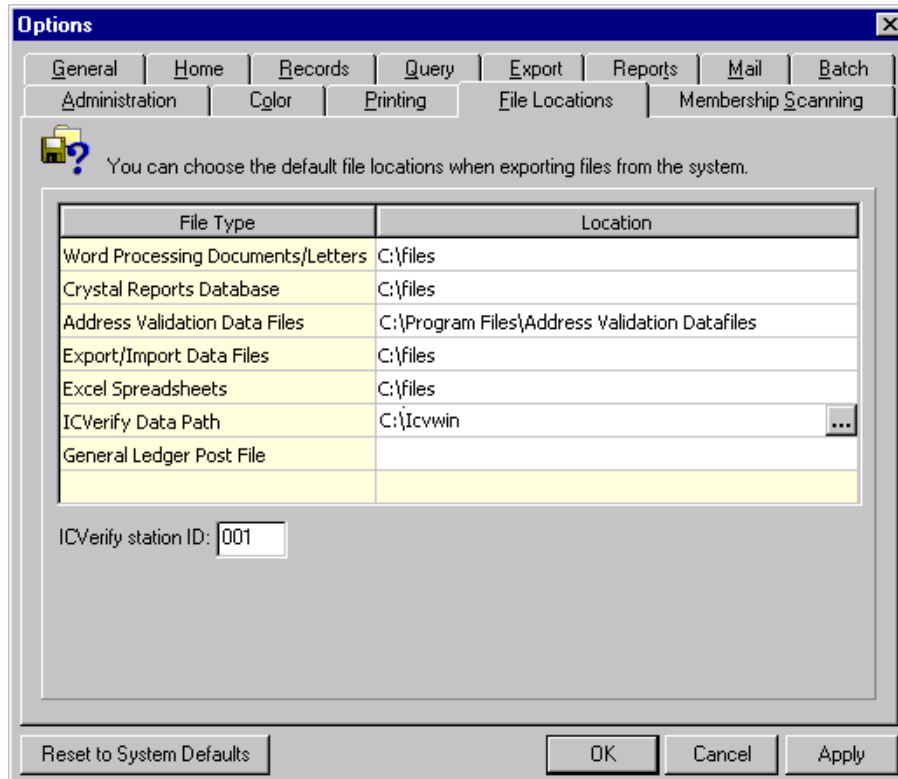


File Locations Tab

When processing credit card transactions with *ICVerify*, you must specify the location of the *ICVerify* files on your workstation. For information about processing credit card transactions with *Electronic Funds Transfer*, see the *Electronic Funds Transfer (EFT) Guide*. For more information about user options in general, see the User Options chapter of the *Program Basics Guide*.

- ☐ From the menu bar on the shell of *The Raiser's Edge*, select **Tools, User Options**. The Options screen appears. Select the File Locations tab. In the **Location** column, enter the location of your *ICVerify* files beside **ICVerify Data Path**. You can click the ellipsis to search for the file location.

On the Options screen, in the **ICVerify station ID** field, enter the ID of your substation. This is a three-digit code used to identify the specific workstation from which a user is initiating the transaction. When you create a transmission file to send to *ICVerify*, the **ICVerify station ID** is incorporated into the file name. This way, when the response is received from *ICVerify*, the response file can be matched with the workstation. This lets multiple users send files to *ICVerify* from the same organization without having the responses mismatched or sent to all users. For more information about configuring *ICVerify* on your workstation, see your *ICVerify* user guide.



Constituent Records

Before you begin processing gifts through *Electronic Funds Transfer*, a constituent record must be in your database for each constituent giving a gift. For constituents who give EFT gifts by direct debit, bank information needs to be established on the constituent record.

- ❑ On the Bio 1 or Org 1 tab of the constituent record, click the **Bank** button. The Bank/Financial Institution screen appears. From the **Bank** button, you can track a constituent's primary bank or financial institution relationship. The primary bank relationship is the bank account from which a constituent usually contributes gifts to your organization. You can track all other bank and financial institution relationships on the Relationships tab.

Bank/Financial Institution for Clara M. Daniels

File Edit View Bank Help

Save and Close

☒ General Account Attributes/Notes

Transit/Routing no.: 00011111

Financial Institution: New York National Bank

Branch name: Main Branch

Bank notes: If there is a problem with any account, see William Cone, the account manager

Electronic Transfer Information

Immediate origin:

☒ Use Transit/Routing number

☐ Other

Account Information

Account number: 0401 1959 0501 1969

Account type: Checking

Bank/Branch Address

Country: United States

Address lines: 625 Park Avenue

City: New York

State: NY New York

ZIP: 10128

Region: Northeast

Phones/Email/Links

DNC	Type	Number/Email Address
	Bank	212-555-0088

☒ Primary bank information ☐ This account is inactive

A bank should be listed on the **Financial Institutions** page of *Configuration* before you add it to a constituent record as a relationship. For information about adding a bank relationship record to a constituent record, see the Constituent Records and Relationships chapters of the *Constituent Data Entry Guide*. For information about adding financial institutions from the Financial Institutions page of *Configuration*, see the Financial Institutions section in the Configuration chapter of the *Configuration & Security Guide*.

EFT Gift Records

Once you create a recurring gift template or a pledge gift record and a constituent is ready to begin donating gifts regularly by direct debit or credit card, you can process the recurring gift transactions and pledge installments using *Electronic Funds Transfer*.

- Your regular supporters will almost always give recurring gifts. With a recurring gift, you set up a gift record in your database with the **Gift type** of Recurring Gift. This gift record is a template. **The Raiser's Edge** uses this recurring gift template to generate gift records with a **Gift type** of Recurring Gift Pay-Cash following a schedule you specify on the recurring gift template. A recurring gift can be open-ended. You do not have to specify an end date or a set number of transactions, and a donor has the freedom to skip payments, when necessary. For example, John Smith becomes a regular donor. He lets you know he would like to give you \$5 a month by direct debit. He specifies no end date for the gift. After sending the prenotification to the bank to ensure the electronic transfer is set up properly, you start collecting \$5 from John's account monthly, until he lets you know he wants to stop the donation. On a rare occasion, John lets you know he cannot make a monthly payment. You skip the transaction without changing the schedule for the recurring gift. Next month, John makes his regular payment. For information about recurring gifts, see "Recurring Gifts" on page 21. For detailed information about recurring gifts, see the Recurring Gifts chapter of the *Gift Records Guide*.

- A regular supporter can also make a pledge to your organization; a promise to make a gift in the future. With a pledge gift, you set up a gift record in your database with the **Gift type** of Pledge. *The Raiser's Edge* generates gift records with a **Gift type** of Pay-Cash following a schedule you specify on the pledge gift record. A pledge can be paid in single or multiple installments. Every gift type except Pledge, Recurring Gift, and Planned Gift can be applied toward a pledge. When a constituent does not pay the amount owed for a pledge, you must write it off so it does not appear as expected income. For detailed information about pledges, see the Pledges chapter of the *Gift Records Guide*.
- With *Electronic Funds Transfer*, you can automatically generate direct debit and credit card gift records for recurring gift transactions and pledge payments using the **Automatically Generate Transactions/Payments** menu option in *Batch*. The generated transactions and payments are automatically applied to the corresponding recurring gift or pledge.

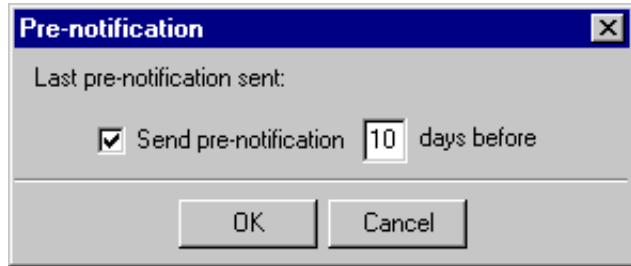
Direct Debit EFT Gift Record

To generate a recurring gift transaction or pledge payment, you must set up several options and checkboxes correctly on the gift record. For complete details about adding gift records to your database, see the *Gift Records Guide*.

The screenshot shows the 'Gift for Timothy D. Billings' window. The 'Gift' tab is selected. The 'Constituent' field is 'Timothy Billings' with ID 7. The 'Gift type' is 'Recurring Gift'. The 'Gift date' is '08/09/2008'. The 'Amount' is '\$10.00'. The 'Campaign' is 'Scholarship Campaign'. The 'Fund' is 'Camp Kids Scholarship'. The 'Appeal' is 'Upgrade Appeal'. The 'Package' is empty. The 'Solitors' are 'Earl Hunter'. The 'Pay method' is 'Direct Debit' and the 'EFT?' checkbox is checked. The 'Bank' is 'New York National Bank'. The 'Reference' is empty. The 'Acknowledge' is 'Acknowledged' with date '08/10/2008'. The 'Receipt' is 'Not Received'. The 'Receipt amt/no.' is '\$10.00'. The 'Status/date' is 'Active' with date '08/09/2008'. The 'Ref no./date' is 'DD82503' with date '08/09/2008'. The 'Prenotify' checkbox is checked. The 'Date added' is '08/09/2008'.

- ☐ In the **Gift type** field, select “Recurring Gift” or “Pledge”.
- ☐ To set up a schedule for the recurring gift or pledge, click the **Schedule** button. The scheduled transaction or installment date must occur on or before the date you enter in the **Transaction due on or before** field on the General tab of the Automatically Generate Transactions/Payments screen.
- ☐ In the **Fund** field, you must select a fund for the recurring gift transaction or pledge payment.
- ☐ In the **Status** field, select “Active”.
- ☐ In the **Pay method** field, select “Direct Debit”.
- ☐ To ensure the recurring gift or pledge is processed electronically when using the **Automatically Generate Transactions/Payments** menu option, mark the **EFT?** checkbox.

- ☐ In the **Bank** field, select the bank from which you will receive the direct debit. The list contains all banks or financial institutions, branches, and account numbers entered on a donor's constituent record.
- ☐ To set up a prenotification, click the **Pre-notify** button. The Pre-notification screen appears. A prenotification is sent to your sponsoring bank to verify that an electronic transfer has been properly set up. A prenotification is processed using a transmission file. In a transmission file, you can include prenotifications for recurring gifts and pledges, along with live transactions, but you cannot process a prenotification and a live transaction at the same time for the same gift.

A screenshot of a Windows-style dialog box titled "Pre-notification". The dialog has a blue title bar with a close button (X) in the top right corner. The main area is light gray and contains the text "Last pre-notification sent:" followed by a checked checkbox labeled "Send pre-notification" and a text input field containing the number "10", followed by the text "days before". At the bottom of the dialog are two buttons: "OK" and "Cancel".

Pre-notification

Last pre-notification sent:

☒ Send pre-notification days before

OK Cancel

- To record that an prenotification should be sent for the gift, mark the **Send pre-notification** checkbox.
 - To prenotify the bank of your future transactions, specify the number of days in the [] **days before** field. The prenotification must be sent at least 10 days prior to the first live transaction of funds from the donor's account.
 - To save and close the pre-notification, click **OK**. You return to the gift record.
- ☐ After you receive the direct debit payment from the bank, you can mark the **Received** checkbox on the gift record.

Credit Card EFT Gift Record

To generate a recurring gift transaction or pledge payment, you should set up several options and checkboxes correctly on the gift record. For complete details about adding gift records to your database, see the *Gift Records Guide*.

The screenshot shows a software window titled "Gift for Kate A. Williams". The "Gift" tab is selected, showing fields for setting up a gift record. The "Constituent" field is "Kate Williams" with ID "89". The "Gift type" is "Recurring Gift". The "Gift subtype" is empty. The "Gift date" is "07/11/2008". The "Amount" is "\$10.00" with a "Schedule" button. The "Campaign" is "Capital Campaign". The "Fund" is "Building Fund". The "Appeal" is "Internet/Web Site solicitations". The "Package" is empty. The "Solicitors" list includes "Nicholas Vincent". The "Pay method" is "Credit Card" with an "EFT?" checkbox checked. The "Card type" is "Visa". The "Cardholder" is "Kathryn Williams". The "Receipt" section shows "Receipted" on "07/11/2008" for "Receipt amt/no.": "\$10.00". The "Status/date" is "Active" on "07/11/2008". The "Card no./exp." is "*****9933" on "08/2011". The "Auth. code" is empty. The "Date added" field is empty.

- ☐ In the **Gift type** field, select "Recurring Gift" or "Pledge".
- ☐ To set up a schedule for the recurring gift or pledge, click the **Schedule** button. The scheduled transaction or installment date must occur on or before the date you enter in the **Transaction due on or before** field on the General tab of the Automatically Generate Transactions/Payments screen.
- ☐ In the **Fund** field, you must select a fund for the gift transaction or pledge payment.
- ☐ In the **Status** field, select "Active".
- ☐ In the **Pay method** field, select "Credit Card".
- ☐ To ensure the recurring gift or pledge is processed electronically when using the **Automatically Generate Transactions/Payments** menu option, mark the **EFT?** checkbox.
- ☐ In the **Card type** field, select the kind of credit card you are using for the gift transaction or pledge payment.
- ☐ In the **Cardholder** field, enter the name that appears on the credit card.

Warning: *The Raiser's Edge* requires Internet access to connect to the Blackbaud *Payment Service*. If *The Raiser's Edge* cannot connect to the Blackbaud *Payment Service*, a message appears. Click **OK** and check your Internet connection. If you cannot restore your Internet connection, you can click the "X" in the upper right corner to close the record without saving.

- ☐ In the **Card no./exp.** field, enter the number that appears on the credit card and the expiration date.

To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), the program immediately sends new or edited credit card information to the Blackbaud *Payment Service* when you click **Save and Close**. Depending on your Internet connection, you may experience a slight delay. In your database, *The Raiser's Edge* stores the reference token used to identify the credit card number in the Blackbaud *Payment Service*. On the record, the **Credit Card No.** field displays a masked credit card number, with only the last four digits visible.

Recurring Gifts

Note: A regular supporter may often give a planned gift. With *PlannedGiftTracker*, you create gift records for your organization's planned giving. For more information, see the *Planned Gift Tracking Guide*.

A recurring gift is a donation that is automatically paid out in scheduled installments over an indefinite or limited period of time. Hopefully, your regular supporters will not specify an end date for their recurring gifts. That way, their donations will become long-term, dependable income for your organization. Having this dependable income means you can maintain your giving levels, continue to invest in long-term projects, and commit to future plans even in an unstable economy.

In *The Raiser's Edge*, when you set up a gift record with the **Gift type** of Recurring Gift, you are creating a template. *The Raiser's Edge* uses the recurring gift template to conveniently generate gift records with a **Gift type** of Recurring Gift Pay-Cash, following a schedule you specify on the template. A recurring gift can be open-ended. When you set up a schedule for a donor, you do not have to specify an end date or a set number of transactions, even though you can. If a donor decides not to specify an end date for a donation, he can still feel very much in control of his donation because he has the freedom to upgrade or downgrade the donated amount, and skip payments when necessary. On a recurring gift template, it is easy to accommodate a regular supporter's wishes. You can easily amend the recurring gift template and keep track of the upgrade or downgrade, the amendment amount, amendment date, and variance between the original recurring gift amount and the newly amended gift amount. You can also easily skip transactions when a donor asks you to do so. You should be able to attract more regular supporters by using recurring gifts because the recurring gift allows them more flexibility in giving. The donors do not feel "locked in" to a set amount, as they often feel with a pledge.

Using recurring gifts, you have some excellent reporting capabilities. You can report on who has amended their recurring gifts, when, and by what amount; you can easily find donors who have missed or skipped recurring gift transactions since the last payment made; and you are able to produce statistics to help determine who you should target and why. You can easily produce statistics to determine who you have lost, how many donors you have lost per month, which age group or gender is donating the most money, or from which ZIP code you are receiving the highest donations. You can also easily determine the success rate of your upgrade campaigns.

To fully understand gift records in *The Raiser's Edge*, we recommend you read the *Gift Records Guide*.

Configuration - Business Rules

On the Business Rules page of *Configuration*, you can set up some business rules that help when adding recurring gifts to your database.

General

Warning: Availability of credit is not checked here. The program validates an account number based on a formula which includes the prefix and number of digits in the account number.

- ☐ When adding a recurring gift record (or any other gift record) with the **Pay method** of Credit Card to the database, you can decide what the program should do if the credit card number is found to be invalid. On the Raiser's Edge bar, click **Config**. The Configuration page appears. Click **Business Rules**. The Business Rules page appears. From the tree view, select **General**. Under **When saving a constituent or gift, if credit card number is invalid**, you can mark **Do not allow record to be saved**, **Display warning**, or **Save record anyway**. For more information about the General business rules, see the Business Rules section in the Configuration chapter of the *Configuration & Security Guide*.

When saving a constituent or gift, if credit card number is invalid...

- ☒ Do not allow record to be saved
- ☐ Display warning
- ☐ Save record anyway

Generate IDs

- ☐ When adding a recurring gift record (or any gift record), you can select to have **The Raiser's Edge** automatically generate a unique gift ID number for each gift you add to the database. On the Business Rules page, from the tree view, select **Generate IDs**. Under **When adding records, automatically generate**, mark the **Gift IDs** checkbox. For more information about the Generate IDs business rules, see the Business Rules section in the Configuration chapter of the *Configuration & Security Guide*.

When adding records, automatically generate...

- ☒ Constituent IDs
- ☒ Gift IDs
- ☒ Membership IDs
- ☒ Event IDs

Gift Options - Activity Options

Note: You can also select to have a warning message appear when a constituent has an outstanding recurring gift when you add a recurring gift from *Batch*. On the Business Rules page, select **Batch options**. Under **When adding a gift to a batch, warn if constituent has**, mark the **Outstanding recurring gifts** checkbox.

- ☐ On the Business Rules page, from the tree view, under **Gift options**, select **Activity options**. Under **When adding a gift warn if constituent has**, mark the **Outstanding recurring gifts** checkbox. When you add a recurring gift to the database, a warning message appears letting you know the constituent has at least one outstanding recurring gift, and asks if you want to apply the gift to a recurring gift. You can also mark the **Outstanding pledge balances**, **Outstanding registration fees**, and **Lapsed memberships** checkboxes. For more information about gift activity business rules, see the Business Rules section in the Configuration chapter of the *Configuration & Security Guide*.

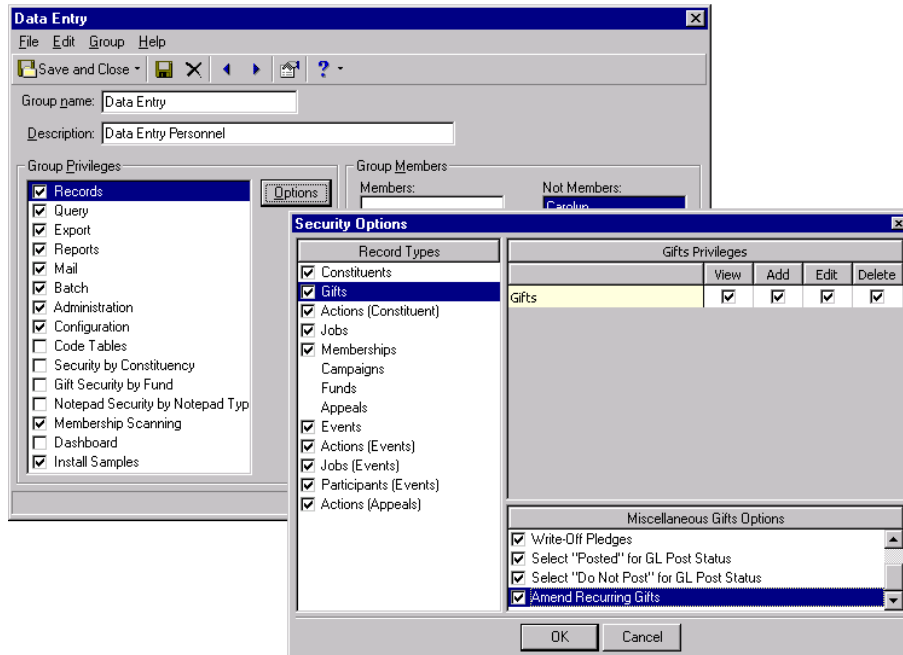
When adding a gift warn if constituent has...

- ☒ Outstanding pledge balances
- ☒ Outstanding recurring gifts
- ☒ Outstanding registration fees
- ☒ Lapsed memberships

Administration - Batch Security

You can assign security rights to recurring gift records (and other gift records) for a group by granting or denying view, add, edit, or delete rights for the entire record. You can also assign rights to amend recurring gift records.

- ❑ On the Raiser's Edge bar, click **Admin**. The Administration page appears. Click **Security**. The Security page appears. To create a new group or edit an existing group, on the action bar, click **New Group** or select an existing group, and click **Open**. On the Group screen, in the **Group Privileges** box, mark **Records**. Click the **Options** button. The Security Options screen appears. In the **Record Types** box, mark **Gift**. In the **Gifts Privileges** box, mark **View, Add, Edit, and Delete** to give users rights to perform these functions. In the **Miscellaneous Gifts Options** box, mark the **Amend Recurring Gifts** checkbox to give users rights to perform this function. If you leave the **Amend Recurring Gifts** checkbox unmarked, a user can view previous amendments on the Amendments tab of a recurring gift template, but cannot add, open, or delete amendment records. For detailed information about security in *The Raiser's Edge*, see the Security chapter of the *Configuration & Security Guide*.



Recurring Gift Record

Warning: You cannot post a recurring gift template to the **General Ledger** or create a receipt for a recurring gift template because it does not represent an actual gift donated to your organization. You can post and receipt the cash payments.

When you add a recurring gift record to your database, you are adding a template that *The Raiser's Edge* uses to generate gifts on scheduled intervals. Recurring gifts are similar to pledges paid in installments, except that recurring gifts are more flexible. They can be open-ended and they give the donor more freedom in managing their donations. Whether a donor is paying a recurring gift by direct debit or credit card, the payment for the recurring gift will always have a **Gift type** of Recurring Gift Pay-Cash. For more information about a recurring gift template and its cash gift records, see the Recurring Gifts chapter of the *Gift Records Guide*.

Recurring Gift Template

When you create a recurring gift template, you can generate identical cash gift records according to the schedule you define on the recurring gift template.

Cash Gift Records

Note: A recurring gift template can be linked to a membership record. From the menu bar of the recurring gift template, select **Gift, Links, Membership**. You can link a recurring gift to a new membership or an existing membership. Each time a cash gift record is generated, the membership can be renewed, upgraded, or downgraded. For information about membership records, see the *Membership Gifts Guide*. A recurring gift template cannot be linked to a proposal or an event record.

This section explains each tab on the recurring gift record and how the program copies the information you enter on these tabs as defaults for cash gift records generated from the template. For a complete explanation of the tabs and functionality available on a gift record, see the Understanding the Tabs on a Gift Record section in the Gift Record Basics chapter of the *Gift Records Guide*.

Gift Tab

The Gift tab of a recurring gift template contains key gift information, including the name of the constituent who donated the gift, the gift amount, and the fund to which the recurring gift is designated. When adding a recurring gift, you first need to enter the name of the constituent who donated the gift in the **Constituent** field. All other fields on the gift record remain disabled until you enter the name. This section explains the fields on the Gift tab that have specific significance on the recurring gift template. For detailed information about the Gift tab, see the Gift Tab segment in the Understanding the Tabs on a Gift Record section in the Gift Record Basics chapter of the *Gift Records Guide*.

- ☐ In the **Gift date** field, enter the date the constituent agrees to donate the recurring gift. When you generate cash gift records from the template, the program automatically defaults the transaction date in the **Gift date** field on the cash gift records. For example, on July 11, Kate Williams agrees to donate \$10 to your organization on the first day of every month. On the recurring gift template, enter the date 07/11/2008 in the **Gift date** field to record the date Kate agrees to donate the gift. When you generate the first cash gift record on August 1, the program automatically enters the date 08/01/2008 in the **Gift date** field on the cash gift record.

Note: You may receive gifts in foreign currency. To convert the foreign currency to your monetary system, use the Currency Exchange feature. From the menu bar of a gift record, select **Gift, Currency Exchange**. The Currency Exchange screen appears. In the **Currency type** field, select the type of currency donated to your organization that you need to convert. For example, if you receive a gift in UK Pounds and need to convert it to US Dollars, select UK Pounds in the **Currency type** field. In the grid, in the **Gift Amount** and **Receipt Amount** rows, in the second column, enter the amount you want to convert. For the previous example, enter the amount donated in UK pounds in the **Pounds (GBR)** column for the **Gift Amount** and **Receipt Amount** rows. Click **OK**. You return to the gift record. The converted amount appears in the **Amount** field. Exchange rates are set up on the International page of *Configuration*. For more information, see the International section in the Configuration chapter of the *Configuration & Security Guide*.

- ☐ In the **Amount** field, enter the amount the constituent wants to pay at a recurring interval. For example, if a constituent wants to donate \$10 each month, enter \$10 in the **Amount** field.

- ❑ To schedule a recurring gift, click the **Schedule** button. The Transaction Schedule screen appears.

Transaction Schedule for Kate A. Williams

Use the 'Schedule' fields, then select 'Preview' to view the transaction schedule.

Transaction Schedule

Transaction Amount: \$10.00

Frequency: Monthly

☒ Day 1 of every 1 month(s)

☐ The [] of every [] month(s)

Starting on: 07/11/2008 Ending on: []

Transactions due every month on the 1st day of the month

Date	Amount
08/01/2008	\$10.00
09/01/2008	\$10.00
10/01/2008	\$10.00
11/01/2008	\$10.00

Preview

OK Cancel

- In the **Frequency** field, select the frequency with which the constituent plans to donate the recurring gift. You can select Annually (once a year), Semi-Annually (twice a year), Quarterly (four times a year), Bimonthly (every other month), Monthly (once a month), Semi-Monthly (twice a month), Biweekly (every two weeks), and Weekly (once a week).
 - Once you make a selection in the **Frequency** field, additional fields appear so you can select and enter the particular days/dates the transactions are due. For example, if you select “Monthly” in the **Frequency** field, two options appear — **Day [] of every [] month(s)** and **The [] [] of every [] month(s)**. Select an option, and fill in the blanks. For example, if a recurring gift transaction is going to occur monthly on the 1st of every month, you select “Monthly” in the **Frequency** field. Then, select the first option and enter a “1” in both empty fields: **Day [1] of every [1] month(s)**. If the transaction is going to occur on the first Monday of every month, you select “Monthly” in the **Frequency** field, and select the second option. In the empty fields, select “First”, then “Monday”, and enter a “1”: **The [First] [Monday] of every [1] month(s)**.
 - In the **Starting on** field, enter the date the first payment is due. The gift date defaults into the **Starting on** field. You can change this date. When the date in the **Starting on** field is not the same date as the normally scheduled transaction date, the first transaction is due on the first transaction date after the **Starting on** date. For example, today’s date, 07/11/2008, defaults into the **Starting on** field. You leave the date in this field. You selected a transaction schedule of monthly on the 1st of every month. The first transaction will actually start on 08/01/2008.
 - On occasion, a constituent may give you an end date for a recurring gift. For example, a constituent decides to donate monthly for the next three years, with the recurring gift ending on 12/31/2011. Enter this date in the **Ending on** field. This is the date transactions stop generating for the recurring gift. Normally, you leave the **Ending on** field blank. Most recurring gifts are indefinite.
 - Once you establish a transaction schedule, click **Preview**. The schedule appears in the grid.
 - To return to the Gift tab, click **Close**.
- ❑ The **Acknowledge** field on the Gift tab of the recurring gift template defaults to Not Acknowledged. You can acknowledge a recurring gift when the constituent agrees to donate the gift, every time the constituent makes a recurring donation, or according to your own schedule. If you decide to acknowledge the recurring gift when the constituent agrees to donate the recurring gift, you can generate a single letter from the Microsoft Word icon in the **Letter** field on the gift record or by using the Donor Acknowledgement Letters mail task in *Mail*. Once you create your letter(s), the program automatically defaults Acknowledged into the **Acknowledge** field. For more information about creating a single letter from a gift record, see the Creating a Letter from a Gift Record section in the Mail Merge With Microsoft Word chapter of *The Raiser’s Edge & Microsoft Office Integration Guide*. For more information about using the Donor Acknowledgement Letters mail task, see the *Mail Guide*.

Your selection in the **Acknowledge** field does not default to the cash gift records generated from the recurring gift template. When you generate cash gift records from the template, the program defaults Not Acknowledged in the **Acknowledge** field on those records, also. On each cash gift record, you should select whether you want to acknowledge the specific recurring gift transaction and enter a reference date. You can use the Microsoft *Word* icon in the **Letter** field on the gift record or the Donor Acknowledgement Letters mail task in *Mail* to acknowledge the payments and default this information.

Note: Each cash gift record generated from the recurring gift template must be receipted separately. If your regular supporters prefer to receive one receipt at the end of the year, you can combine all the gifts on one receipt by selecting "Consolidated receipts" in the **Receipt type** field on the Bio 2 tab of each supporter's constituent record. When you run the Receipts mail task, you can include the Recurring Gift Pay-Cash gift type.

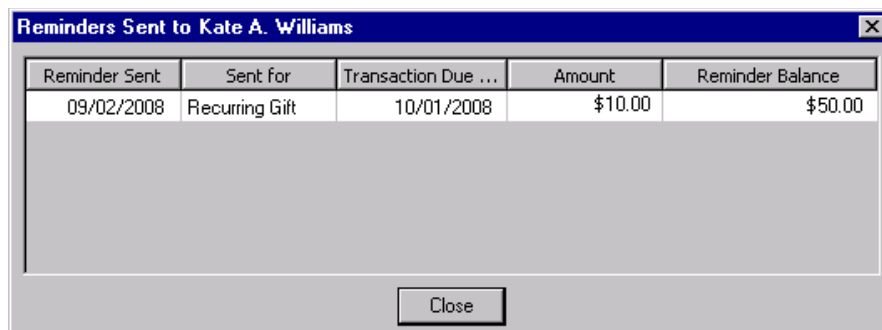
- ☐ The **Receipt** field tracks whether or not you sent a receipt for the gift. Because a recurring gift template does not represent an actual gift, you cannot create a receipt for the recurring gift template itself. You can create a receipt for each cash gift record generated from the template. Therefore, you need to record the receipt status on each of these cash gift records. Your entry in the **Receipt** field on the recurring gift template does, however, default to each cash gift record generated from the template. So, if you create a recurring gift template for a constituent who does not want to receive receipts for his gifts, select Do Not Receipt in the **Receipt** field on the template. The program then defaults Do Not Receipt in the **Receipt** field on each cash gift record generated from the template.

When you use *Mail* to create gift receipts, select Not Receipted in the **Receipt** field on the template and do not enter a reference date. The program defaults Not Receipted in the **Receipt** field on each cash gift record. After you create receipts in *Mail*, the program updates this **Receipt** field to Receipted and adds the date you printed the receipts on the cash gift record. For more information about generating receipts using the Receipts mail task, see the *Mail Guide*.

- ☐ To increase the number of constituents who pay their recurring gifts, you can send a letter or card to remind donors of the commitments they have made. In *Mail*, you can use the Reminders mail task to print recurring gift reminders on several types of forms you order from Blackbaud. If you do not want to use these forms, you can use the mail task to export data to an application where you created a custom form. For a donor to receive a recurring gift reminder using the Reminders mail task, mark the **Send reminders** checkbox.

When creating recurring gift reminders, you can choose to send either a single reminder for the entire recurring gift or a reminder each time a payment is due. For more information about sending recurring gift reminders using the Reminders mail task, see the *Mail Guide*.

- ☐ The **History** button appears beside the **Send reminders** checkbox. Click the **History** button. The Reminders Sent screen appears, so you can view all reminders sent to the constituent for the recurring gift.



Reminder Sent	Sent for	Transaction Due ...	Amount	Reminder Balance
09/02/2008	Recurring Gift	10/01/2008	\$10.00	\$50.00

- ☐ The **Status/date** fields determine whether you can apply or generate gifts from the recurring gift template and track the date of the most recent status change. When you add a recurring gift, the **Status** defaults to Active and the status **date** defaults to the date you enter the gift. When you select a different status in the **Status** field, the date you make the change defaults into the **date** field and overwrites the date currently in the field. A recurring gift template can have a status of Active, Held, Terminated, or Completed. When a recurring gift template has the status of Active, the program can generate cash gift records from the template according

to the schedule you establish. If a recurring gift template has a status of Held, Terminated, or Completed, the program cannot generate cash gift records. For a detailed explanation of each status, see The Life of a Recurring Gift segment in the Understanding the Recurring Gift Template section in the Recurring Gifts chapter of the *Gift Records Guide*. Gift status and how it affects the electronic generation of recurring cash gift payments is discussed in the *Electronic Gifts (EFT) Guide*.

- ☐ In the **Pay Method** field, select the payment method the regular supporter will use to pay the recurring gift. For electronic gifts, select “Direct Debit” or “Credit Card”. The payment method is a very important part of the recurring gift template because the method a constituent uses to donate a gift affects the options available to generate transactions from the recurring gift template. For information about all pay methods available for gift records in *The Raiser’s Edge*, see Selecting the Payment Method in the Gift Tab segment in the Understanding the Tabs on a Gift Record section in the Gift Record Basics chapter of the *Gift Records Guide*.

A constituent can donate a cash gift to your organization in two ways: electronically and non-electronically. If a constituent uses a non-electronic payment type, such as personal or business check, your organization receives the gift when you deposit the donor’s check in the bank. For your recurring gifts, you will normally use the electronic payment types, such as a direct debit and credit card. When you use these electronic payment types and mark the **EFT?** checkbox, you can process the transactions using an electronic funds transfer. When you use *Electronic Funds Transfer*, you automatically generate cash payments for your recurring gifts, create direct debit transmission files to send to your sponsoring bank, and create credit card transmission files to process through IATS or ICVerify. For more information, see “Electronic Funds Transfer” on page 3. For detailed information, see the *Electronic Gifts (EFT) Guide*.

Miscellaneous Tab

Note: You can use the Notes grid on the recurring gift template and the cash gift records to track anything you deem important. For example, you may use it to make notations about why a status changed for a recurring gift.

All entries on the Miscellaneous tab of the recurring gift template appear as defaults on cash gift records generated from the template. For example, if you add a note in the Notes grid on the recurring gift template, the program adds the note to every cash gift record generated from the template. If the note does not apply to a particular cash gift record, you can delete the note from the cash gift record without deleting the note from the recurring gift template, and add new relevant notes about the cash payment. For detailed information about the fields, checkbox, and grid on the Miscellaneous tab, see the Miscellaneous Tab segment in the Understanding the Tabs on a Gift Record section in the Gift Record Basics chapter of the *Gift Records Guide*.

Gift for Kate A. Williams

File Edit View Gift Favorites Tools Help

Save and Close Print Find Navigation

Gift Miscellaneous Soft Credit Matching Gifts Tribute Attributes Transactions Amendments Split Gift

Gift ID: 1068 GL post status: Not Posted

Gift code: Payroll giving GL post date: 07/15/2008

Constituency: Friend ☐ Gift is anonymous

New Notepad Open Delete... Notepad types: <All Notepad Types>

Type	Date	Description	Notes
Payroll Giving	07/11/2007	Gives electronically through direct debit	The status of the gift is active.

Because a recurring gift template is not associated with an actual gift, you cannot post it to the **General Ledger**. Instead, you post each cash gift record generated from the recurring gift template to the **General Ledger** separately. The program will default the Not Posted and Do Not Post entries in the **GL post status** and **GL post date** fields on the recurring gift template to each cash gift record generated from the template. For example, you create a recurring gift template for a constituent who donates monthly gifts of \$10 and select Not Posted in the **GL post status** field on the recurring gift template. The program defaults Not Posted in the **GL post status** field for each cash gift record generated from the template.

When you use the **Post to General Ledger** functionality in *Administration*, the **GL post status** automatically changes to Posted and the date you post the gift defaults into the **GL post date** field. For information about the **Post to General Ledger** functionality in *Administration*, see the General Ledger section in the Configuration chapter of the *Configuration & Security Guide*.

Soft Credit Tab

A soft credit allows more than one constituent to share credit for a recurring gift. You can split the credit evenly between all soft credit recipients, give each recipient full credit for the gift, or define your own credit distribution. You can soft credit as many constituents as necessary as long as each soft credit recipient is a constituent in the database. For detailed information about the Soft Credit tab, see the Soft Credit Tab segment in the Understanding the Tabs on a Gift Record section in the Gift Record Basics chapter of the *Gift Records Guide*.

When you add soft credit recipients on the Soft Credit tab of a recurring gift template, the program defaults the soft credit recipients to the Soft Credit tab of each cash gift record generated from the template. For example, when Kate Williams donates a recurring gift of \$10 to your organization, she wants her aunt and uncle, Michelle and Max Taylor, to each receive a soft credit of \$5. You can add the soft credit for Michelle and Max Taylor on the Soft Credit tab of the recurring gift template. When you create cash gift records from the template, the program soft credits Michelle and Max Taylor on the Soft Credit tab of each cash gift record.

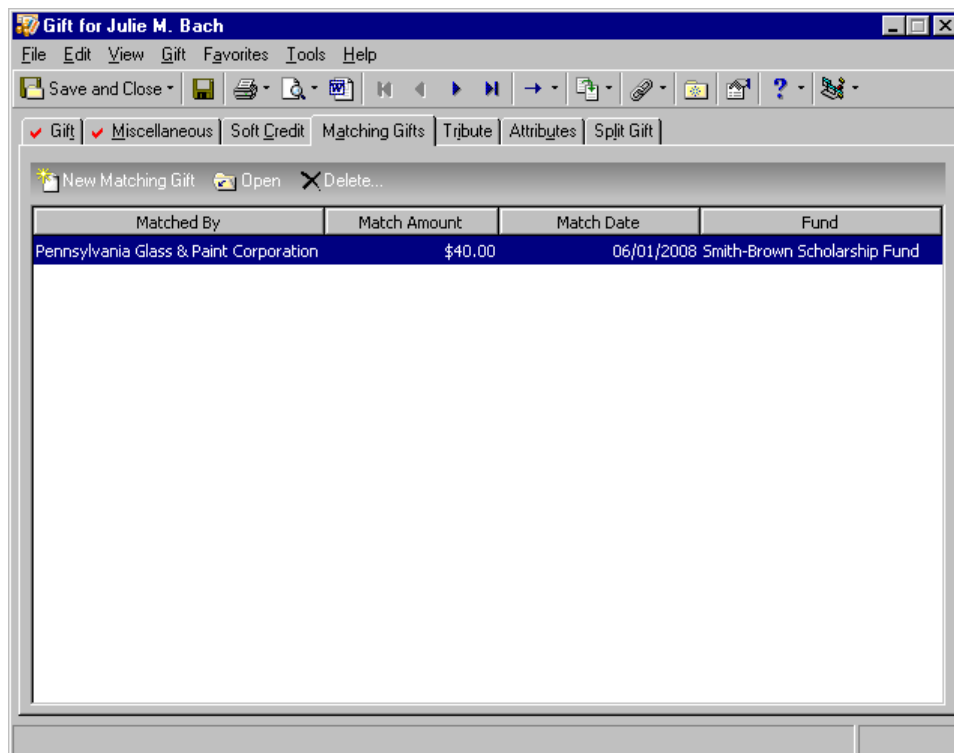
The screenshot shows a software window titled "Gift for Kate A. Williams". It has a menu bar with "File", "Edit", "View", "Gift", "Favorites", "Tools", and "Help". Below the menu is a toolbar with icons for "Save and Close", "Print", "Find", "New", "Open", "Save", "Undo", "Redo", "Help", and "Exit". A tabbed interface is present with tabs: "Gift", "Miscellaneous", "Soft Credit", "Matching Gifts", "Tribute", "Attributes", "Transactions", "Amendments", and "Split Gift". The "Soft Credit" tab is selected. Above the table, there is a label "Enter by:" with two radio buttons: "Amount" (selected) and "Percent". The table has two columns: "Constituent Name" and "Amount". It contains two rows of data:

Constituent Name	Amount
Michelle Taylor	\$5.00
Max Taylor	\$5.00

Below the table is a large empty text area. At the bottom right of the window is a button labeled "Distribute...".

Matching Gifts Tab

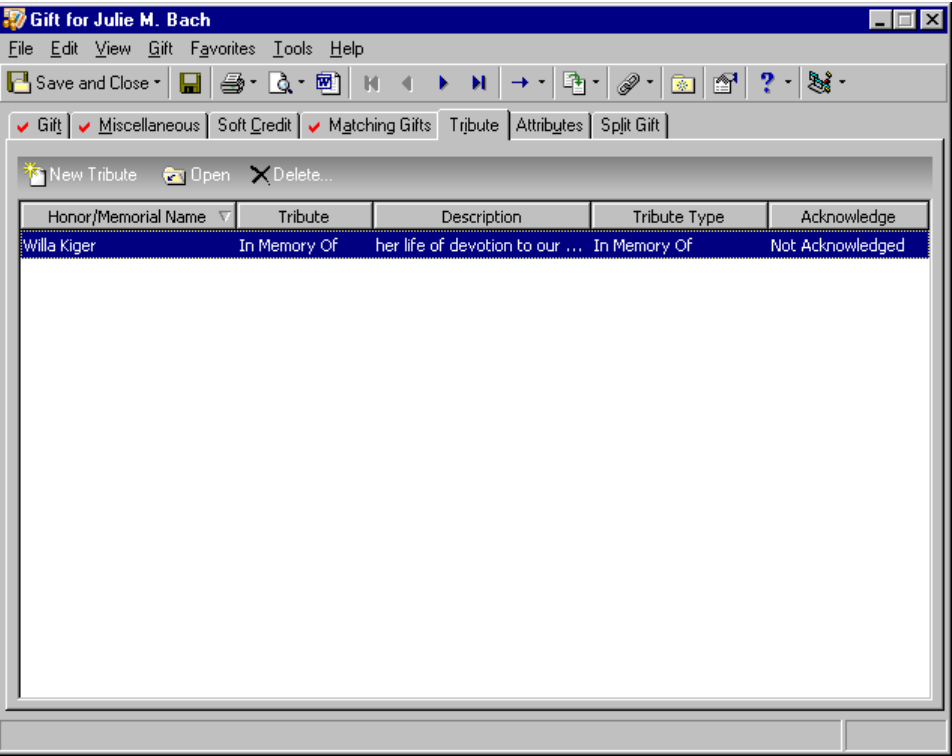
Sometimes, companies match gifts donated to nonprofit organizations by their employees or corporate partners. For example, Julie Bach, an employee of Pennsylvania Glass & Paint Corporation, donates a recurring gift of \$20 to your organization directly from her wages as a part of Pennsylvania Glass & Paint's payroll giving program. As part of the payroll giving program, Pennsylvania Glass & Paint matches employee gifts on a two-to-one ratio. Because Pennsylvania Glass & Paint matches gifts donated by their employees, you receive an additional \$40 gift from Pennsylvania Glass & Paint each time you receive a cash gift payment for Julie's recurring gift. You can add a matching gift to a recurring gift template the same way you add a matching gift to any other gift record. For detailed information about matching gifts, see the Matching Gifts chapter of the *Gift Records Guide*.



Tribute Tab

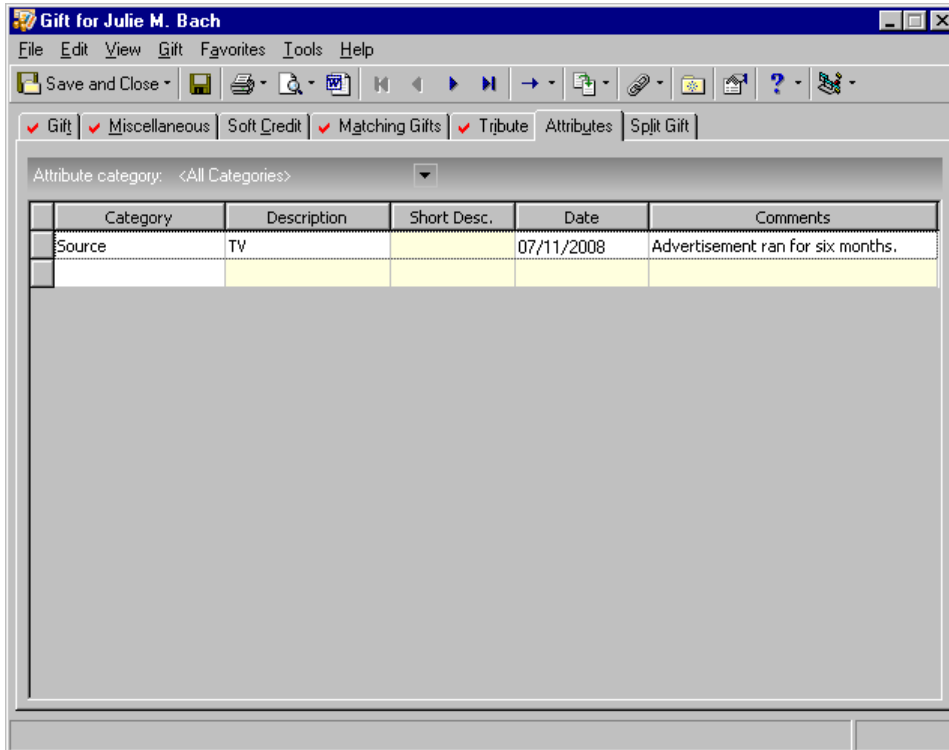
Note: An honor/memorial is a constituent who is being honored, memorialized, or celebrated by gifts donated to your organization. A tribute explains the reason why you are honoring, memorializing, or celebrating a constituent. For detailed information about tribute gifts, see the *Tribute Gifts Guide*. For information about *Honor/Memorial Tracking*, see the *Tribute Data Entry Guide*.

When you have *Honor/Memorial Tracking*, you can designate a recurring gift to one or more tributes using the Tribute tab on the recurring gift template. When you add honor/memorial information to the Tribute tab of the recurring gift template, the program defaults this information on the Tribute tab of each cash gift record created from the template. For example, Julie Bach donates a \$20 recurring gift in memory of Willa Kiger. You add the tribute to Willa Kiger on the Tribute tab of the recurring gift template. Every time Julie gives \$20 and you generate a cash gift record, the program adds Willa Kiger’s tribute on the Tribute tab of the cash gift record. You designate a recurring gift to a tribute the same way you designate any other gift type to a tribute. For detailed information about tribute gifts, see the *Tribute Gifts Guide*.



Attributes Tab

You can use attributes to store additional, helpful information about a recurring gift. All entries on the Attributes tab on the recurring gift template appear as defaults on cash gift records generated from the template. If an attribute does not apply to a particular cash gift record, you can delete the attribute from the cash gift record without deleting the attribute from the recurring gift template. You can also add any other relevant ones. The Attributes tab can be helpful for tracking, for example, the venue or agency that helped you solicit the regular supporter. Or, perhaps you want to track that the recurring gift was brought in from a particular source, such as a television or radio advertising campaign. For information about setting up attributes in *The Raiser's Edge*, see the Attributes section in the Configuration chapter of the *Configuration & Security Guide*.



Transactions Tab

Note: You can add additional columns to the grid on the Transactions tab, and you can remove columns. Right-click on the grid. A menu appears. Select **Columns**. The Columns screen appears. Select the columns you want to view in the grid by using the single right and left arrows to move the columns back and forth between the **Columns** and **Display these columns** boxes. Once you move all the columns you want to view into the **Display these columns** box, click **OK**. You return to the Transactions tab. Your selected columns now appear in the grid.

When you select Recurring Gift in the **Gift type** field on the Gift tab of the recurring gift template, the Transactions tab appears. The grid on this tab displays information about all transactions generated or applied to the recurring gift. For example, if a constituent made three payments for the recurring gift, the grid displays three entries describing the date the payments were made, the amount of each payment, any reference information, and the type of letter sent acknowledging the payment. If you committed the payment to the database using *Batch*, the program also displays the batch number to which you committed the gift. If you have not already set up a schedule for the recurring gift on the Gift tab, you can set it up on the Transactions tab by clicking the **Schedule** button. On the Transactions tab, you can also skip a transaction and roll back a transaction. Skipped

transactions appear in the grid, and prevent a particular scheduled transaction from being generated. If a constituent sends a donation for a skipped transaction, you can remove (rollback) the skipped transaction as long as you have not generated another transaction after the skipped transaction you want to pay. The skipped transaction entry is removed from the grid. For information on the Transactions tab and detailed procedures about how to skip and roll back transactions, see the Recurring Gifts chapter of the *Gift Records Guide*.

Gift for Joseph Bernstein

File Edit View Gift Favorites Tools Help

Save and Close Print Find Navigation

Gift Miscellaneous Soft Credit Matching Gifts Tribute Attributes Transactions Amendments Split Gift

Schedule Frequency: Monthly

Scheduled Date	Activity Type	Gift Date	Amount	Reference	Letter Code	Batch No.
04/01/2008	Payment	04/02/2008	\$10.00		Personalized Thank ...	47
05/01/2008	Payment	05/03/2008	\$10.00			48
06/01/2008	Payment	06/01/2008	\$10.00			49
07/01/2008	Payment	07/01/2008	\$10.00			50
08/01/2008	Skipped Transaction					

Rollback Transaction Skip Next Transaction

Received: \$40.00 Next transaction amount: \$10.00 Next transaction due: 09/01/2007

Amendments Tab

For information about the Amendments tab and recurring gift amendments, see “Recurring Gift Amendments” on page 42.

Split Gift Tab

On the Split Gift tab, you can split a recurring gift between multiple campaigns, funds, appeals, or packages. When you split a gift, the program displays the campaigns, funds, appeals, and packages you select on the Split Gift tab in the corresponding fields on the Gift tab. Then, the program disables the **Campaign**, **Fund**, **Appeal**, and **Package** fields on the Gift tab. When you enter information on the Split Gift tab of a recurring gift template, the program copies this information as a default to each cash gift record generated from the template. You can split a recurring gift the same way you split a gift record for any other gift type. For detailed information about the Split Gift tab, see the Split Gift Tab segment in the Understanding the Tabs on a Gift Record section in the Gift Record Basics chapter of the *Gift Records Guide*.

Gift for Kate A. Williams

File Edit View Gift Favorites Tools Help

Save and Close

Gift Miscellaneous Soft Credit Matching Gifts Tribute Attributes Transactions Amendments Split Gift

Enter by: ☒ Amount ☐ Percent

Campaign	Fund	Appeal	Package	Amount
Capital Campaign	Building Fund	Internet/Web Site solicitations		\$5.00
Capital Campaign	Botanical Garden Fund	Internet/Web Site solicitations		\$5.00

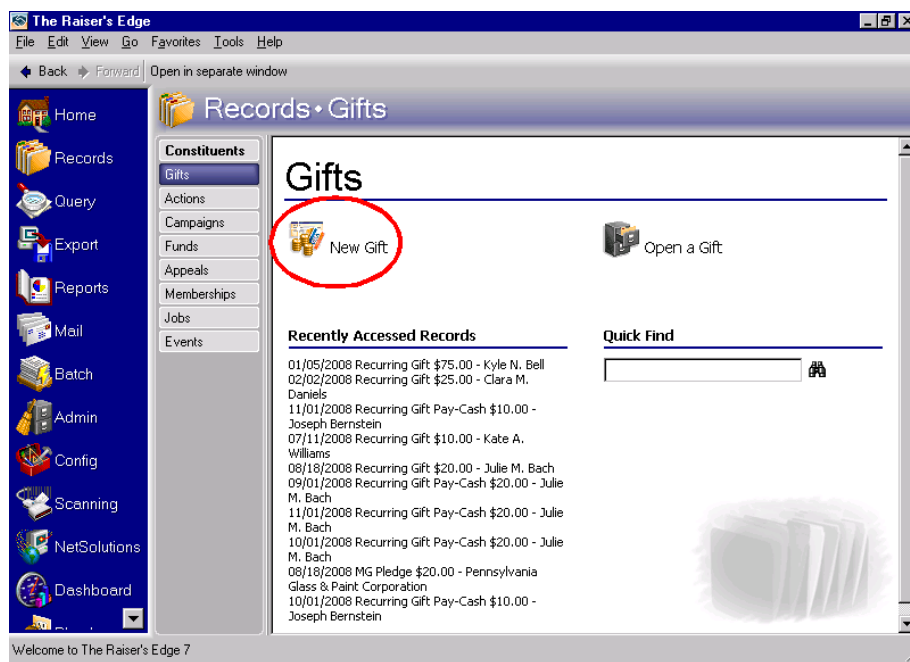
Distribute Evenly

Gift amount: \$10.00 Distributed: \$10.00 Remaining: \$0.00

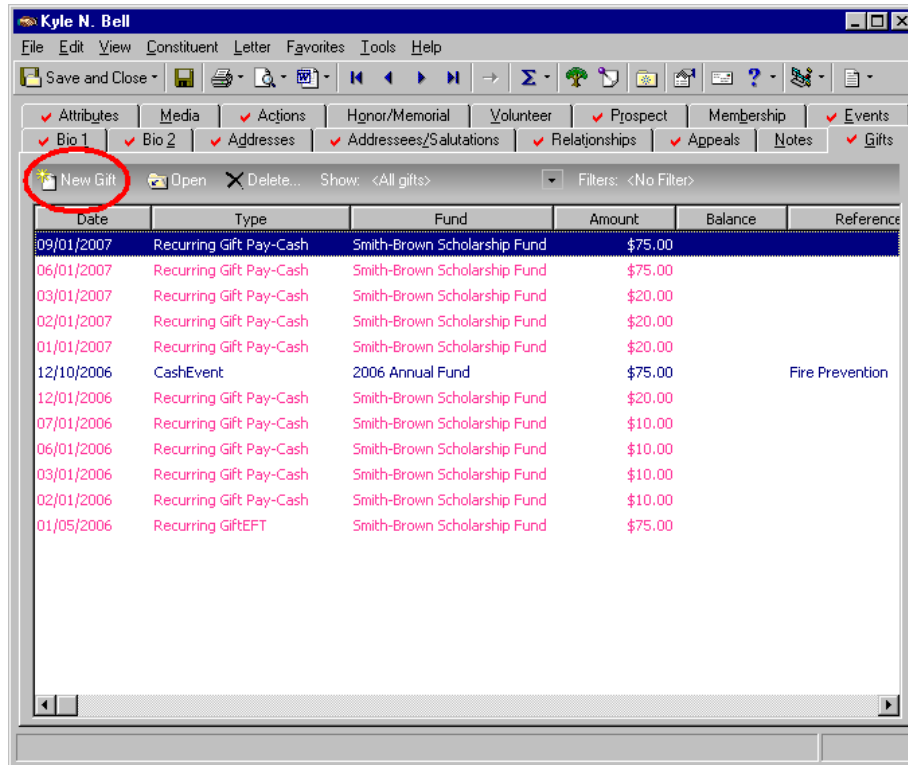
Adding Recurring Gifts to the Database

You can add recurring gift templates to your *Raiser's Edge* database in several ways.

- ❑ You can add recurring gifts one at a time from the Gifts page of *Records*. On the Raiser's Edge bar, click **Records**. Click the **Gifts** button. The Gifts page appears. Click **New Gift**. The New Gift screen appears. Once you search your database for the **Constituent** who is giving the gift, select "Recurring Gift" in the **Gift type** field and continue to add your gift information. For information about adding gift records to your database, see the *Gift Records Guide*.



- ❑ You can add recurring gifts one at a time from the Gifts tab of a constituent record. On the Raiser's Edge bar, click **Records**. Click the **Constituents** button. The Constituents page appears. Click **Open a Constituent**. The Open screen appears, so you can search your database for the constituent who is giving the recurring gift. Once you find and open the constituent record, select the Gifts tab. On the action bar, click **New Gift**. The New Gift screen appears. In the **Gift type** field, select "Recurring Gift" and continue to add your gift information. For information about adding gift records to your database, see the *Gift Records Guide*.



- ❑ Using *Batch*, you can add many recurring gift records to the database at once. You enter recurring gift records quickly because you do not have to add each gift record individually. Instead, you select the fields you want to add and the program lists the fields in a spreadsheet, called a batch, so you can efficiently enter information. To create records for the recurring gifts entered in a batch, after data entry, commit the batch to the database. On the Raiser's Edge bar, click **Batch**. The Batch page appears. On the action bar, to create a new gift batch, click **New Gift Batch**. To open an existing batch, select a batch in the grid, and click **Open** on the action bar. The Batch screen appears. For detailed information about adding and updating gift records using *Batch*, see the Gift Batch chapter of the *Batch Guide*.

Constituent Name	Amount	Date	Type	Campaign	Fund	Appeal
*		09/06/2007	Recurring Gift	Scholarship Campaign	Camp Kids Scholarship	Annual Mailing
Ashton, Elizabeth	\$5.00	09/06/2007	Recurring Gift	Scholarship Campaign	Camp Kids Scholarship	Annual Mailing
Baker, Francis	\$5.00	09/06/2007	Recurring Gift	Scholarship Campaign	Camp Kids Scholarship	Annual Mailing
Cone, Agnes	\$25.00	09/06/2007	Recurring Gift	Scholarship Campaign	Camp Kids Scholarship	Annual Mailing
Dubose, Collin	\$10.00	09/06/2007	Recurring Gift	Scholarship Campaign	Camp Kids Scholarship	Annual Mailing
Elzy, Melissa	\$10.00	09/06/2007	Recurring Gift	Scholarship Campaign	Camp Kids Scholarship	Annual Mailing
Frantz, Paul	\$25.00	09/06/2007	Recurring Gift	Scholarship Campaign	Camp Kids Scholarship	Annual Mailing
Gaskins, Frederic	\$15.00	09/06/2007	Recurring Gift	Scholarship Campaign	Camp Kids Scholarship	Annual Mailing
Haas, Lisa	\$5.00	09/06/2007	Recurring Gift	Scholarship Campaign	Camp Kids Scholarship	Annual Mailing
Ivery, Claudia	\$10.00	09/06/2007	Recurring Gift	Scholarship Campaign	Camp Kids Scholarship	Annual Mailing
Jones, Terry	\$20.00	09/06/2007	Recurring Gift	Scholarship Campaign	Camp Kids Scholarship	Annual Mailing
Kemp, Bebe	\$20.00	09/06/2007	Recurring Gift	Scholarship Campaign	Camp Kids Scholarship	Annual Mailing
Lambert, Marianne	\$15.00	09/06/2007	Recurring Gift	Scholarship Campaign	Camp Kids Scholarship	Annual Mailing
McGrann, Orla	\$5.00	09/06/2007	Recurring Gift	Scholarship Campaign	Camp Kids Scholarship	Annual Mailing
Nolan, Dale	\$10.00	09/06/2007	Recurring Gift	Scholarship Campaign	Camp Kids Scholarship	Annual Mailing
Osborne, Neil	\$25.00	09/06/2007	Recurring Gift	Scholarship Campaign	Camp Kids Scholarship	Annual Mailing
Prescott, Sidney	\$5.00	09/06/2007	Recurring Gift	Scholarship Campaign	Camp Kids Scholarship	Annual Mailing

Gift 16 of 16 Running Total: \$210.00

- ❑ In **Import**, using the **Gift** import type, you can import new recurring gift records into your database. On the Raiser's Edge bar, click **Admin**. The Administration page appears. Click the **Import** button or link. The Import page appears. All import types appear in a tree view on the left side of the screen. Information appears on the right side of the screen depending on the import type you select on the left and if you have a corresponding import type saved. To create a new gift import, select the **Gift** import type under **Gift** in the tree view, and click **New Import** on the action bar. The Import screen appears. For detailed information about importing new records into *The Raiser's Edge*, importing updates to existing records in *The Raiser's Edge*, and creating an import file of records in your *Raiser's Edge* database to use in another application, see the *Import Guide*.

Import - Gift

File Edit View Favorites Tools Help

1: General 2: File Layout 3: Fields 4: Summary

What do you want to do?

☒ Import new records

☐ Update existing records

☐ Create import file

Options

☐ Validate data only

☐ Create new table entries

☐ Import records not found as new records

☐ Automatically add installments for new pledges

What file do you wish to import?

Import file: C:\MS\Import_Files\Gift_Import.csv

How do you want the system to identify existing constituents?

☒ Use the Import ID

☐ Use the Constituent ID

☐ Use the Social Security Number

What is the format of this import file?

☒ Delimited - Characters separate the fields

☐ Fixed width - Fields and records have a set length Rec. length: No. of fields:

< Back Next > Cancel Save Import Now

- ❑ Using **Import Recurring Gifts** on the Plug-Ins page, you can import new recurring gift records into your **Raiser's Edge** database in an import file with a set format defined by Blackbaud. You can use a single flat file to import recurring gift records and any associated new individual constituent records and/or new bank/financial institution records. This feature can be beneficial when you receive import files with this type information from outside agencies or organizations. On the Raiser's Edge bar, click **Plug-Ins**. The Plug-Ins page appears. Click the **Import Recurring Gifts** button or link. The Import Recurring Gifts screen appears. For information about using **Import Recurring Gifts** on the Plug-Ins page, see the Import Recurring Gifts chapter of the *Import Guide*.

Import Recurring Gifts

What do you want to do?

☒ Import recurring gifts
☐ Validate recurring gift import file

What file do you want to import?

Import file: C:\MS\Import_Files\RecurringGifts.csv

Assign this constituent code to new constituents

Constituent code: Donor
Date from: 09/09/2009

Assign these addressee/salutations to new constituents

Primary addressee: Mr. William H. Smith, Jr.
Primary salutation: Mr. Smith

Import options

☒ Create Constituent query of records imported
☒ Create exception file of records not imported C:\MS\Import_Files\Exceptions.csv
☒ Create exception report ☒ Preview ☐ Print
☒ Create control report ☒ Preview ☐ Print

Import Now Cancel

Converting Pledges to Recurring Gifts

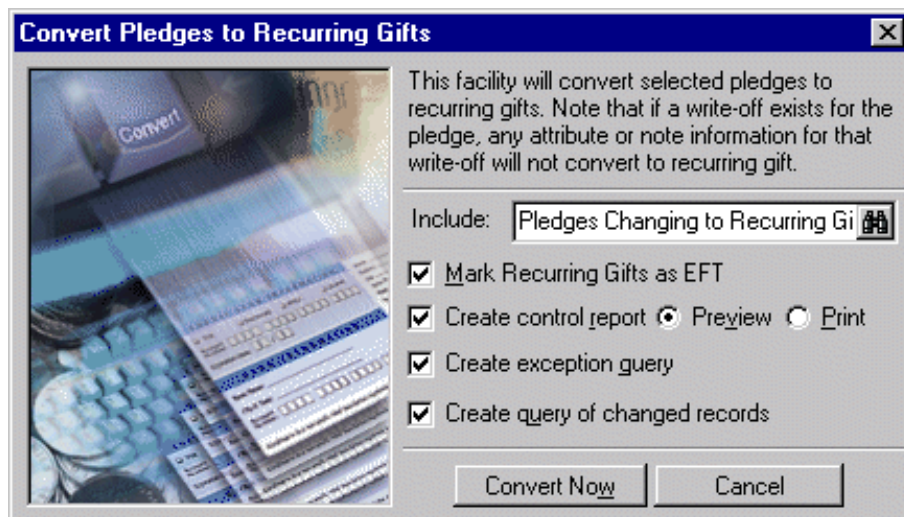
Warning: Before you convert any gift records in *The Raiser's Edge*, you should have a complete backup of your database. Once you convert the records, the conversion is permanent. To successfully back up your data, we recommend you use a proper tape backup system. If you do not have a tape backup system in place, you can back up your data through the Blackbaud Management Console. For more information, see the *Database Administration Guide*.

You may want to convert certain pledge gifts to recurring gifts. Recurring gifts are more useful for tracking scheduled gifts for your regular supporters. For example, pledges have an installment schedule with an end payment date and a total amount. Recurring gifts do not; they can be open-ended with no set number of transactions. On a recurring gift, you have the Amendments tab. When a donor requests you make changes to her recurring gift (for example, change the transaction schedule, upgrade or downgrade the donated amount,

change the appeal and solicitor, or change the fund to which the donation is going), you can easily amend the recurring gift information and track the changes on the Amendments tab. Pledges do not have this convenient amendment functionality. If you previously used *The Raiser's Edge 6*, you may have added open-ended gifts to your database as pledges because recurring gifts did not exist then. You can use the **Convert Pledges to Recurring Gifts** utility in *Administration* to convert these pledges to recurring gifts in *The Raiser's Edge*.



- ❑ On the Raiser's Edge bar, click **Admin**. The Administration page appears. Click the **Convert Pledges to Recurring Gifts** link or button. The Convert Pledges to Recurring Gifts screen appears. Before running the **Convert Pledges to Recurring Gifts** utility, you must create a gift query of records to use for your conversion. By doing so, you can review the query results to make sure you are converting the correct pledge gift records. For information about how to create a query, see the Query chapter of the *Query & Export Guide*. For detailed information about converting pledges to recurring gifts, see the Converting Pledges to Recurring Gifts section in the Recurring Gifts chapter of the *Gift Records Guide*.



Recurring Gift Amendments

Note: You can add additional columns to the grid on the Amendments tab, and you can remove columns. Right-click on the grid. A menu appears. Select **Columns**. The Columns screen appears. Select the columns you want to view in the grid by using the single right and left arrows to move the columns back and forth between the **Columns** and **Display these columns** boxes. Once you move all the columns you want to view into the **Display these columns** box, click **OK**. You return to the Amendments tab. Your selected columns now appear in the grid.

The Amendments tab of a recurring gift template tracks amendment information for a recurring gift record. The grid on the Amendments tab displays by default the amendment date, the name of the person who entered the amendment information, the amended gift amount, the previous gift amount before the change, the variance between the amended amount and the previous amount, and the fund to which the amended recurring gift is going. You can add additional columns that may be more helpful for your organization, and you can remove any columns you feel are not helpful.

Date	Entered By	Amended Amount	Previous Amount	Variance	Fund
03/01/2006	Supervisor	\$250.00	\$75.00	\$100.00 semi-annually	Smith-Brown Sch...
06/01/2005	Supervisor	\$75.00	\$20.00	\$15.00 quarterly	Smith-Brown Sch...
12/01/2004	Supervisor	\$20.00	\$10.00	\$10.00 monthly	Smith-Brown Sch...

Warning: Because the amendment takes over the recurring gift immediately, if you have an amendment that will not start until a future date, you should not add the amendment until after the last payment of the old schedule. For example, Julie Bach has a recurring gift set up for \$10 to be paid on the 1st of every month. Today is 10/15/2007. Julie lets you know she wants to upgrade the amount of her recurring gift to \$15, starting January 2008. If you add the amendment now, the 11/01/2007 and 12/01/2007 transactions will appear as skipped on the Transactions tab, and these two transactions will not be processed. To keep this from happening, you should not add the amendment until after 12/15/2007. As a work around, you can keep the amendment in a file, add an action reminder to the database to remind you of the date you should add the amendment, and add the amendment at the appropriate time.

Once you add an amendment for a recurring gift, the amendment takes over the recurring gift immediately. On the Gift tab of the original recurring gift template, the **Gift date**, **Gift subtype**, **Amount**, **Campaign**, **Fund**, **Appeal**, **Package**, **Solicitors**, **Acknowledge**/date, and **Letter** fields are all disabled, as is the Transaction Schedule accessed from the **Schedule** button. On the Tax tab, the **Tax claim eligible** checkbox is disabled. Any changes you need to make to the recurring gift template must now be made to the amendment record on the Amendments tab. If more than one amendment exists, you can make changes only to the last amendment added. If you delete the last amendment, the recurring gift information (listed above) goes back to the previous amendment or the original recurring gift information, when no other amendment exists.

To add an amendment to a recurring gift template, select the Amendments tab. On the action bar, click **New Amendment**. The New Amendment screen appears.

Note: On the Amendments tab of a recurring gift template, to open an existing amendment record, select the amendment in the grid and click **Open** on the action bar. To delete an amendment, select the amendment and click **Delete**.

- ☐ On the Amendment tab, in the **Amendment date** field, enter the date you are making the amendment to the recurring gift. Your entry here does not change the **Gift date** on the Gift tab of the original recurring gift template. The original **Gift date** is kept intact, disabled, and kept for historic purposes.
- ☐ In the **Gift subtype** field, you can select a new subtype or leave the subtype from the original recurring gift template. Once you select a subtype in the **Gift subtype** field, it appears in the **Gift subtype** field on the Gift tab of the original recurring gift template, and that field is disabled.

The gift subtype is a way for you to further define a gift. It can also be used to define a **General Ledger** distribution. The **General Ledger** distribution is the financial account numbers associated with the **Gift type**, **Gift subtype**, and **Fund** you select on the gift record. For information about **General Ledger** distributions, see the Interfund Entries section in the Configuration chapter of the *Configuration & Security Guide*.

- ☐ In the **Amount** field, enter the amended amount the constituent wants to pay at a recurring interval. A regular supporter may want to upgrade or downgrade his donation amount. Once you enter an amendment amount, that amount appears in the **Amount** field on the Gift tab and the **Amount** column of the Split Gift tab of the original recurring gift template, and those fields are disabled.

Note: On the Transaction Schedule screen, the **Starting on** date defaults to the amendment date and cannot be less than the last transaction date of the recurring gift. The first transaction date is always after the last transaction date of the recurring gift, and is calculated from the **Starting on** date or the date of the last transaction, whichever date is latest. If payments are missed between the last payment date and the start of the new schedule, the payments are automatically skipped.

- ☐ You can reschedule an amended recurring gift, if requested, or you can leave the schedule from the original recurring gift template. To reschedule transactions, click the **Schedule** button. The Transaction Schedule screen appears. Once you enter a new schedule and click **Close**, the new schedule appears on the Transaction Schedule screen, and all fields are disabled. The new schedule also appears on the Transaction Schedule screen accessed from the **Schedule** button on the Gift and Transactions tabs of the original recurring gift template, and those fields are also disabled.
- ☐ In the **Campaign** field, you can select a new campaign or leave the campaign from the original recurring gift template. Once you enter a new campaign, that campaign appears in the **Campaign** field on the Gift tab and the **Campaign** column of the Split Gift tab of the original recurring gift template, and those fields are disabled.
- ☐ In the **Fund** field, you can select a new fund or leave the fund from the original recurring gift template. Once you enter a new fund, that fund appears in the **Fund** field on the Gift tab and the **Fund** column of the Split Gift tab of the original recurring gift template, and those fields are disabled.
- ☐ In the **Appeal** field, you can select a new appeal or leave the appeal from the original recurring gift template. It is often a new appeal that prompts a change in the donated amount. Once you enter a new appeal, that appeal appears in the **Appeal** field on the Gift tab and the **Appeal** column of the Split Gift tab of the original recurring gift template, and those fields are disabled.
- ☐ In the **Package** field, you can select a new package or leave the package from the original recurring gift template. Once you enter a new package, that package appears in the **Package** field on the Gift tab and the **Package** column of the Split Gift tab of the original recurring gift template, and those fields are disabled.
- ☐ In the **Solicitors** field, you can select a new solicitor or leave the solicitors from the original recurring gift template. Once you enter a new solicitor, that solicitor appears in the **Solicitors** field on the Gift tab of the original recurring gift template, and that field is disabled.

Warning: When you add an amendment, if you previously used the Microsoft **Word** button to create a letter, and saved the letter as an action, the link between that action and the recurring gift template will be broken. The action will not be deleted. It is still retained on the Actions tab of the donor's constituent record. The original action is unlinked from the recurring gift template because once an amendment is added, a new letter may be created and saved as an action. If you delete the amendment, the original action will be relinked to the recurring gift template.

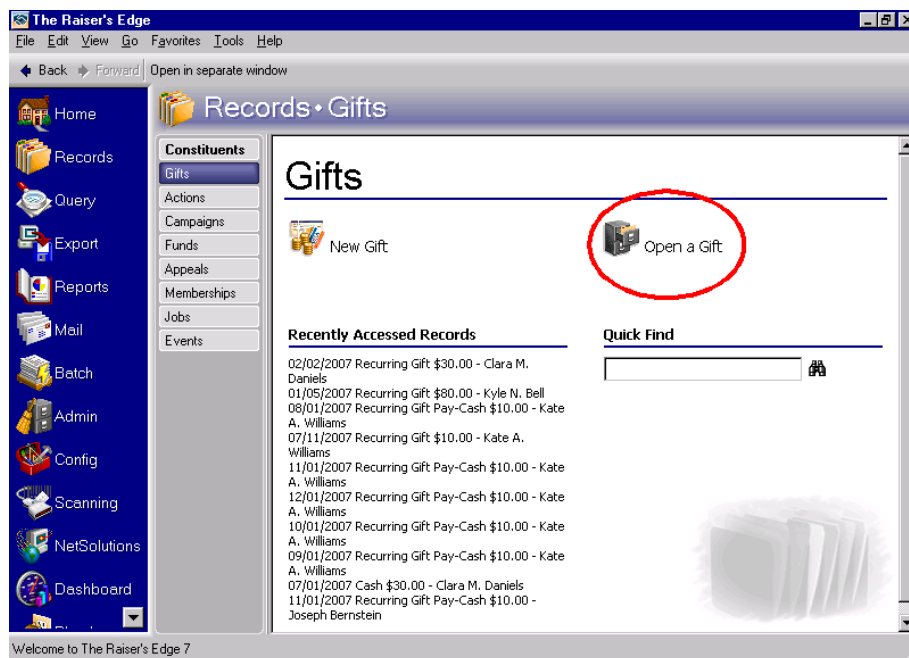
- ☐ When you add an amendment record, your selections in the **Acknowledge**/date and **Letter** fields on the original recurring gift template default into the **Acknowledge**/date and **Letter** fields on the amendment record. To acknowledge the recurring gift by creating a single letter using the Microsoft **Word** button on the toolbar of the original recurring gift template, you should select "Not Acknowledged" in the **Acknowledge** field, and clear the date. In the **Letter** field, select the letter you want to write. Once you create the letter using the Microsoft **Word** button on the toolbar of the original recurring gift template, the date you create the letter appears in the **Acknowledge** date field and the **Letter** field is disabled. You can also acknowledge a recurring gift amendment by using the Donor Acknowledgement Letters mail task in *Mail*. Any letter created for the amendment will list on the Letters sent to screen, accessed from the **Letters** button on the amendment record or the original recurring gift record. For more information about creating a single letter from a gift record, see the Creating a Letter from a Gift Record section in the Mail Merge With Microsoft Word chapter of *The Raiser's Edge & Microsoft Office Integration Guide*. For more information about using the Donor Acknowledgement Letters mail task, see the *Mail Guide*.
- ☐ In the **Notes** box, enter anything you deem important about the amendment or recurring gift template.
- ☐ On the Split Gift tab of the amendment record, you can split a recurring gift between multiple campaigns, funds, appeals, or packages or leave the distributions from the original recurring gift template. Once you split a recurring gift between multiple campaigns, funds, appeals, or packages, the changes appear in the correct fields on the Gift tab of the original recurring gift template, and the fields are disabled.

Adding Recurring Gift Amendments to Recurring Gifts in the Database

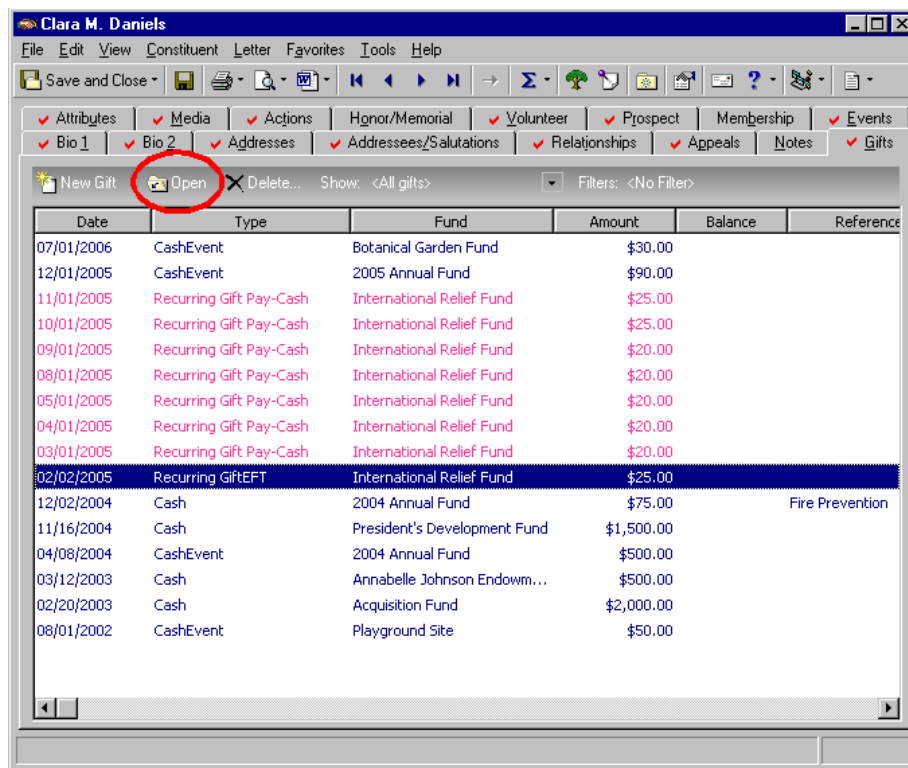
Warning: If you convert a gift from a foreign currency to your monetary system using the Currency Exchange feature (**Amendment, Currency Exchange** from the menu bar of the amendment record), the **Currency type** for an amendment cannot be different than the original **Currency type** on the original recurring gift template. If a constituent donates in a different currency, you must end the recurring gift and create a new one. However, you can change the **Exchange rate** for an amendment.

You can add recurring gift amendment records to a recurring gift template in your *Raiser's Edge* database in several ways.

- ❑ You can open recurring gifts one at a time from the Gifts page of *Records* to amend them. On the Raiser's Edge bar, click **Records**. Click the **Gifts** button. The Gifts page appears. Click **Open a Gift**. The Open screen appears, so you can search your database for the recurring gift that needs to be changed. Once you find and open the gift record, select the Amendments tab. On the action bar, click **New Amendment**. The New Amendment screen appears. For information about amending recurring gift records, see "Recurring Gift Record" on page 23. For detailed information about recurring gift records, see the Recurring Gifts chapter of the *Gift Records Guide*.



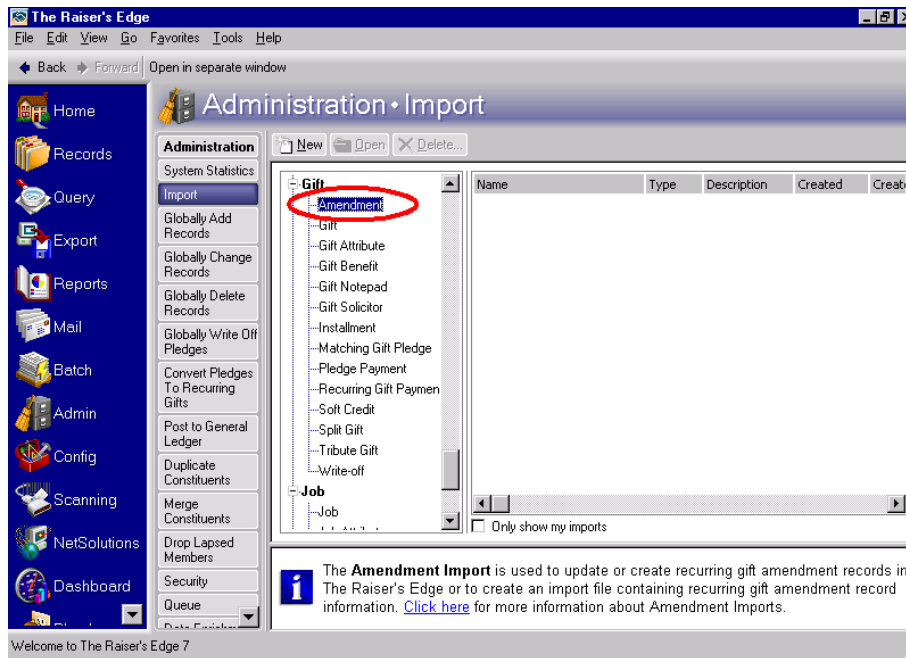
- ❑ You can open recurring gifts one at a time from the Gifts tab of a constituent record to amend them. On the Raiser's Edge bar, click **Records**. Click the **Constituents** button. The Constituents page appears. Click **Open a Constituent**. The Open screen appears, so you can search your database for the constituent who gave the recurring gift you want to amend. Once you find and open the constituent record, select the Gifts tab. In the Gifts grid, select the recurring gift you want to change, and click **Open** on the action bar. The Gift screen appears. Select the Amendments tab. For information about amending recurring gift records, see "Recurring Gift Record" on page 23. For detailed information about recurring gift records, see the Recurring Gifts chapter of the *Gift Records Guide*.



Warning: To create a new import to add new amendment records for recurring gift templates in your database, or to update amendment records that already exist, you must include the **Constituent Import ID** and the **Gift Import ID** as import fields on the Fields tab of the Import - Amendment parameter file.

- ❑ In **Import**, using the **Amendment** import type, you can import into your database new amendment records for recurring gift templates. You can also update amendment records that already exist on the Amendments tab of a recurring gift template. On the Raiser's Edge bar, click **Admin**. The Administration page appears. Click the **Import** button or link. The Import page appears. All import types appear in a tree view on the left side of the screen. Information appears on the right side of the screen depending on the import type you select on the left and if you have a corresponding import type saved. To create a new import to add new amendment

records for recurring gift templates, or to update amendment records that already exist, select the **Amendment** import type, under **Gift** in the tree view, and click **New Import** on the action bar. The Import screen appears. For detailed information about importing new records into *The Raiser's Edge*, importing updates to existing records in *The Raiser's Edge*, and creating an import file of records in your *Raiser's Edge* database to use in another application, see the *Import Guide*.



Processing Recurring Gift Transactions

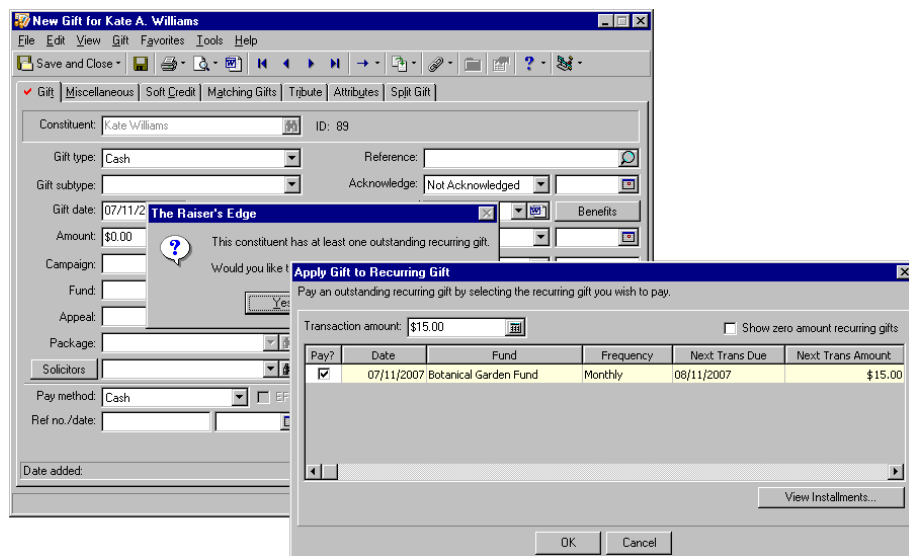
Note: If you use the optional module *NetSolutions*, you can download credit card and direct debit transactions online. For more information, see the *NetSolutions Guide*.

Once you create a recurring gift template and a constituent begins donating gifts regularly according to schedule, you need to create a cash gift record for each of these donations. You can generate transactions for a recurring gift template in several ways.

Note: A constituent can give a cash payment for a recurring gift electronically and non-electronically. If a constituent uses a non-electronic payment type, such as personal or business check, your organization receives the gift when you deposit the check in the bank. For recurring gifts, you normally use electronic payment types, such as a direct debit and credit card. When you use these electronic payment types and mark the **EFT?** checkbox beside the **Pay method** field, you can process the transactions using an electronic funds transfer. When using *Electronic Funds Transfer*, you can automatically generate cash payments for recurring gifts, create direct debit transmission files to send to your sponsoring bank, and create credit card transmission files to process through IATS or ICVerify. For more information, see "Electronic Funds Transfer" on page 3. For detailed information, see the *Electronic Gifts (EFT) Guide*.

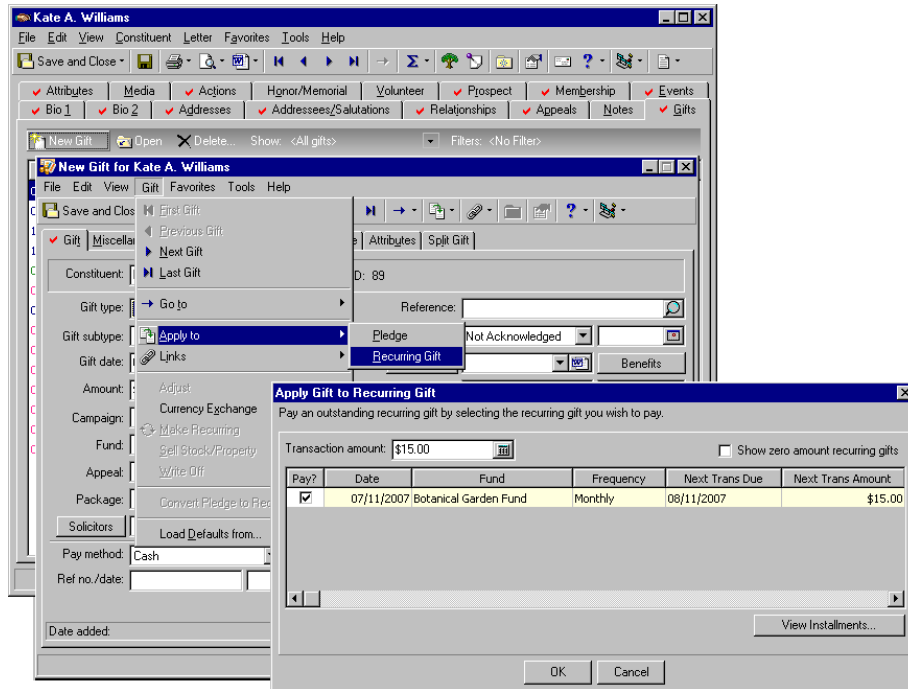
- ☐ You can add a new cash gift record from the Gifts page of *Records* and apply it to the recurring gift template. On the Raiser's Edge bar, click **Records**. Click the **Gifts** button. The Gifts page appears. Click **New Gift**. The New Gift screen appears. In the **Constituent** field, click the binoculars to search your database for the constituent who is donating the gift. Once you find and select the constituent, if you set the **When adding a gift warn if constituent has... Outstanding recurring gifts** business rule, a message appears letting you know the constituent has at least one outstanding recurring gift, and asks if you want to apply the gift to a recurring gift. Click **Yes**. The Apply Gift to Recurring Gift screen appears, so you can select the recurring gift to which to apply

the cash gift. You then enter a **Transaction amount**. If you did not set the business rule, you can access the Apply Gift to Recurring Gift screen by selecting **Gift, Apply to, Recurring Gift** from the menu bar of the cash gift record. For more information about applying a cash gift record to a recurring gift template, see the Recurring Gift Transactions section in the Recurring Gifts chapter of the *Gift Records Guide*. For information about setting up business rules, see the Business Rules section in the Configuration chapter of the *Configuration & Security Guide*.



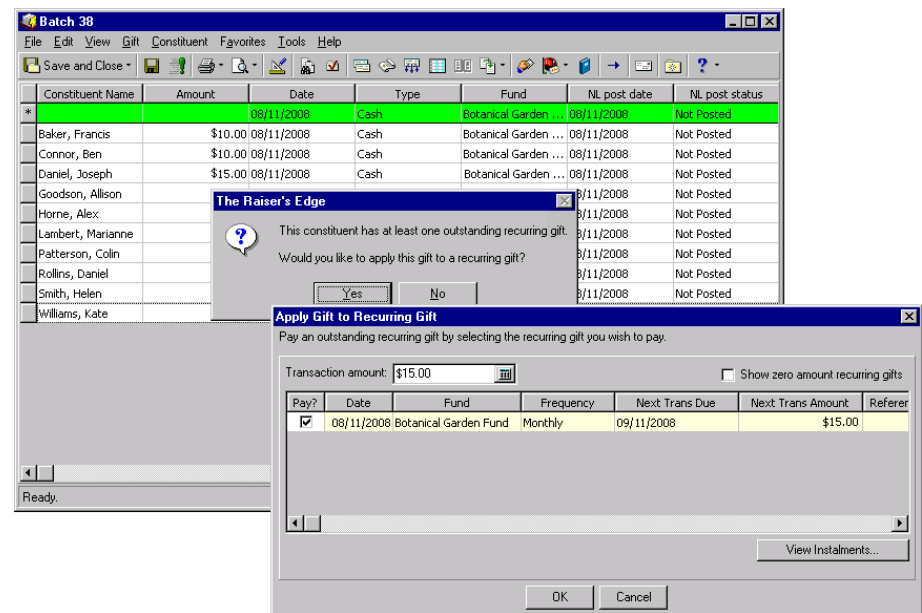
- ❑ You can add a new cash gift record from the Gifts tab of a constituent record. On the Raiser's Edge bar, click **Records**. Click the **Constituents** button. The Constituents page appears. Click **Open a Constituent**. The Open screen appears so you can search your database for the constituent who is giving the recurring gift. Once you find and open the constituent record, select the Gifts tab. On the action bar, click **New Gift**. The New Gift screen appears. If you set the **When adding a gift warn if constituent has... Outstanding recurring gifts** business rule, a message appears letting you know the constituent has at least one outstanding recurring gift, and asks if you want to apply the gift to a recurring gift. Click **Yes**. The Apply Gift to Recurring Gift screen appears so you can select the recurring gift to which to apply the cash gift. You then enter a **Transaction**

amount. If you did not set the business rule, you can access the Apply Gift to Recurring Gift screen by selecting **Gift, Apply to, Recurring Gift** from the menu bar of the cash gift record. For more information about applying a cash gift record to a recurring gift template, see the Recurring Gift Transactions section in the Recurring Gifts chapter of the *Gift Records Guide*. For information about setting up business rules, see the Business Rules section in the Configuration chapter of the *Configuration & Security Guide*.



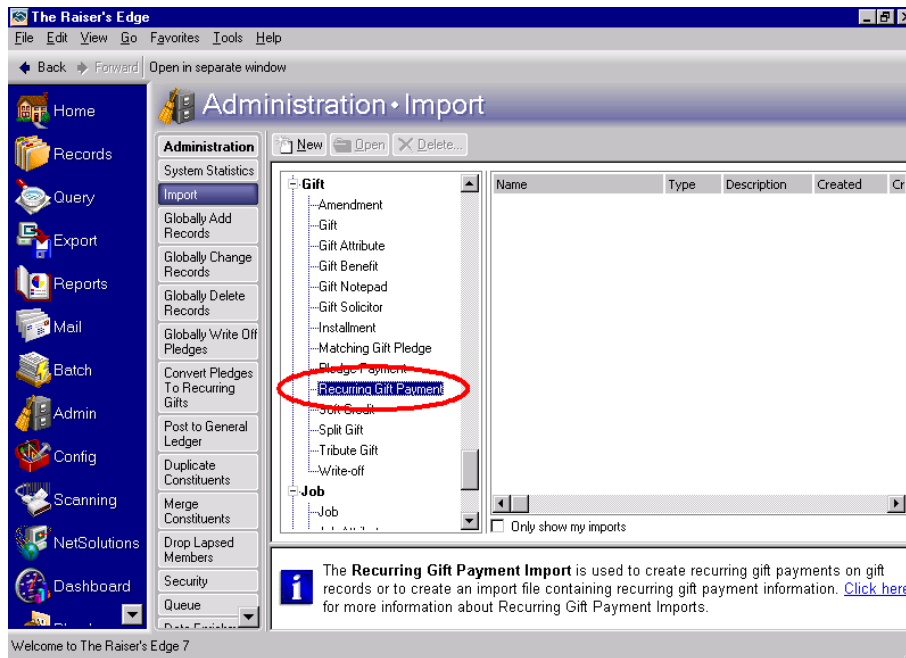
- Using **Batch**, you can add many cash gift records to the database at once. On the Raiser's Edge bar, click **Batch**. The Batch page appears. On the action bar, to create a new gift batch, click **New Gift Batch**. To open an existing batch, select a batch in the grid, and click **Open** on the action bar. The Batch screen appears. In the **Constituent Name** column, click the binoculars. The Open screen appears so you can search your database for the constituent who is giving the recurring gift. Once you find and open the constituent record, if you set the **When adding a gift to a batch, warn if constituent has... Outstanding recurring gifts** business rule, a message appears letting you know the constituent has at least one outstanding recurring gift, and asks if you want to

apply the gift to a recurring gift. Click **Yes**. The Apply Gift to Recurring Gift screen appears, so you can select the recurring gift to which to apply the cash gift. You then enter a **Transaction amount**. If you did not set the business rule, you can access the Apply Gift to Recurring Gift screen by selecting **Gift, Apply to, Recurring Gift** from the menu bar of the Batch screen. For detailed information about adding and updating gift records using *Batch*, see the Gift Batch chapter of the *Batch Guide*.



❑ In **Import**, using the **Recurring Gift Payment** import type, you can import into your database new cash gift records to apply to recurring gift templates. On the Raiser's Edge bar, click **Admin**. The Administration page appears. Click the **Import** button or link. The Import page appears. All import types appear in a tree view on the left side of the screen. Information appears on the right side of the screen depending on the import type you select on the left and if you have a corresponding import type saved. To create a new import to add new

cash gift records to apply to recurring gift templates, or to create an import file containing cash gift payment information for recurring gift templates, select the **Recurring Gift Payment** import type, under **Gift** in the tree view, and click **New Import** on the action bar. The Import screen appears. For detailed information about importing new records into *The Raiser's Edge* and creating an import file of records in your database to use in another application, see the *Import Guide*.



Recurring Gift Data Extraction and Reporting

Once you add recurring gift templates to your database, receive payments toward the recurring gifts, and start using the recurring gift amendment functionality to track the changes in your regular supporters' giving, you will need a way to extract this data from *The Raiser's Edge*. You can use *Query*, *Export*, *Reports*, *Dashboard*, and *Mail* to get the data you need. For example, you can effectively thank your donors, correspond with them about their commitments to your organization, communicate with your donors about where their money is going, and contact donors when they have missed a certain number of payments. You can also report internally on how your regular supporters programs are doing, how many donors you have gained or lost, who has upgraded or downgraded their donations, and analyze demographic statistics to determine which regions to target and why.

Query and Export

In *Query* and *Export*, many fields exist to help you extract data so you can better analyze, report on, contact, recruit, and maintain your regular supporters. For detailed information about *Query* and *Export*, see the *Query & Export Guide*.

- Special gift information fields help you extract information about your recurring gifts.

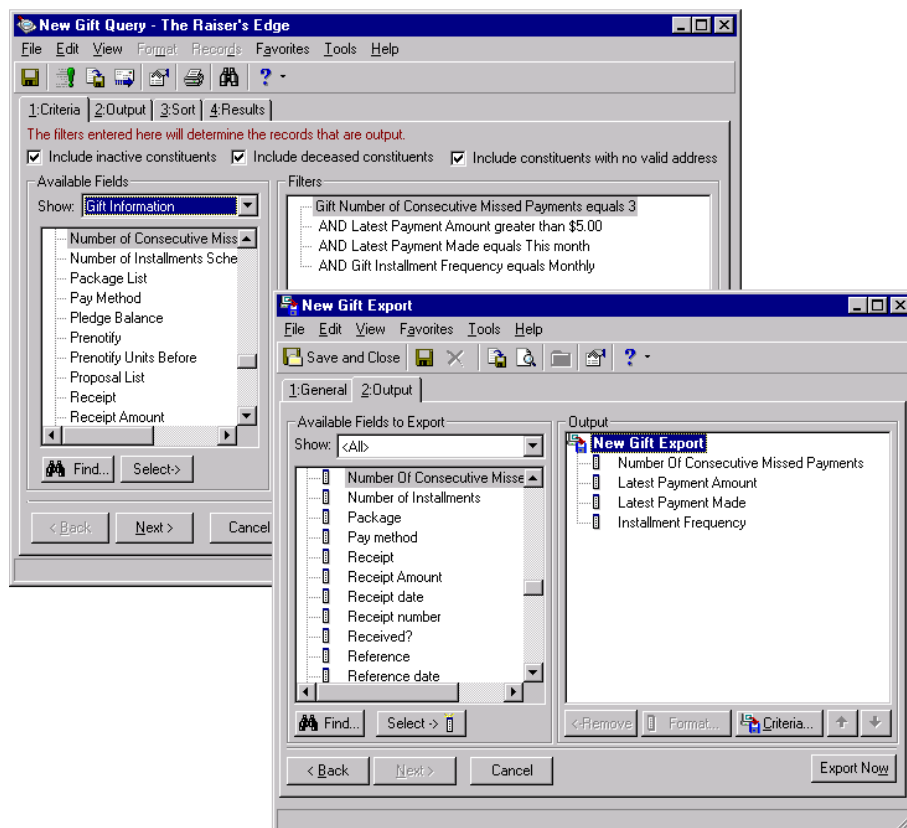
Note: To remove regular supporters who have missed payments consecutively from future mailings, transaction files, etc., you can create a query using the **Number of Consecutive Missed Payments** field. Then you can use this query to globally change the appropriate recurring gift records' status to Terminated. For information about **Global Change**, see the *Global Add, Delete, & Change Guide*.

Number of Consecutive Missed Payments - This number is the number of payments skipped or missed since the last payment made. This field calculates only for recurring gifts. For other gift types, the field will appear blank.

Latest Payment Amount - This is the most recent payment amount for a recurring gift template.

Latest Payment Made - This is the most recent payment date for a recurring gift template.

Installment Frequency - This frequency for Recurring Gift Pay - Cash gifts is always the current frequency on the recurring gift.



Note: Fields under the Amendments group having a plus sign beside them can be expanded. When you click the plus sign, additional fields appear.

- An entire Amendments group helps you extract information about your recurring gift amendments.

Acknowledge

Acknowledge Date

Amendment Date

Amount

Amount Variance

Appeal List

Campaign List

Solicitor List

Currency Amount

Letter

Notes

Package List

Previous Amount

Previous Frequency

Subtype

System Record ID

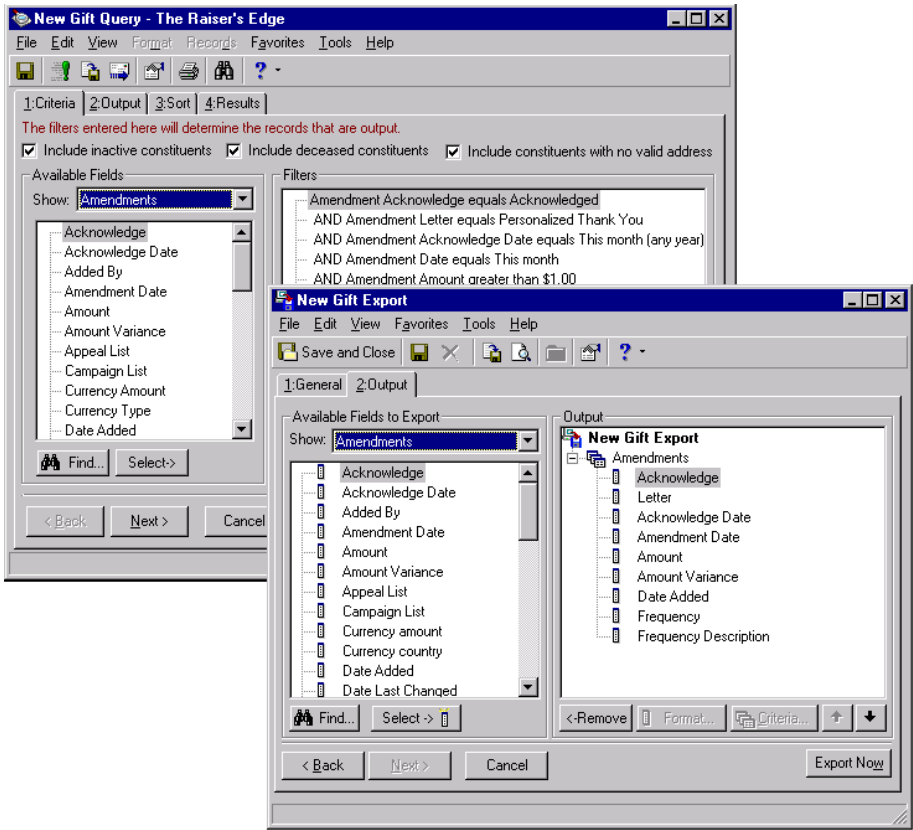
VBA User Field (Export only)

+Appeals

Currency Type (Query only)	+Campaigns
Currency Country (Export only)	+Solicitors
Date Added	+Funds
Date Last Changed	+Packages
Exchange rate	+Previous Appeals
Frequency	+Previous Campaigns
Frequency Description	+Previous Solicitors
Fund List	+Previous Funds
Import ID	+Previous Packages
Last Changed By	

The **Amount Variance** field may need a little explanation. The **Amount Variance** is the difference between the **Amount** on the Amendment tab of the amendment record and the **Amount** on the Amendment tab of the previous amendment record, if more than one amendment exists. If only one amendment exists, it is the difference between the **Amount** on the Amendment tab of the amendment record and the **Amount** on the Gift tab of the original recurring gift. The **Amount Variance** is easily calculated when the frequency for the amount and the previous amount are the same (amendment amount - previous recurring gift amount =

variance amount). However, when the frequency changes on an amendment, the previous amount will be calculated using the new frequency. For example, if the original recurring gift is \$60 annually, and the amendment changes to \$6 monthly, the \$60 is converted to a monthly frequency ($\$60/12 \text{ months} = \5 monthly). Then the difference is calculated: \$6 (amendment amount) - \$5 (previous recurring gift amount) = \$1 (amount variance).



- The **Letters Sent** group helps you easily export the history of letters sent to your constituents. This includes those letters sent to your regular supporters concerning their recurring gifts or recurring gift amendments. The **Letters Sent** group appears under the **Constituent** category in *Export*. It does not appear in *Query*.

Constituent

Letter

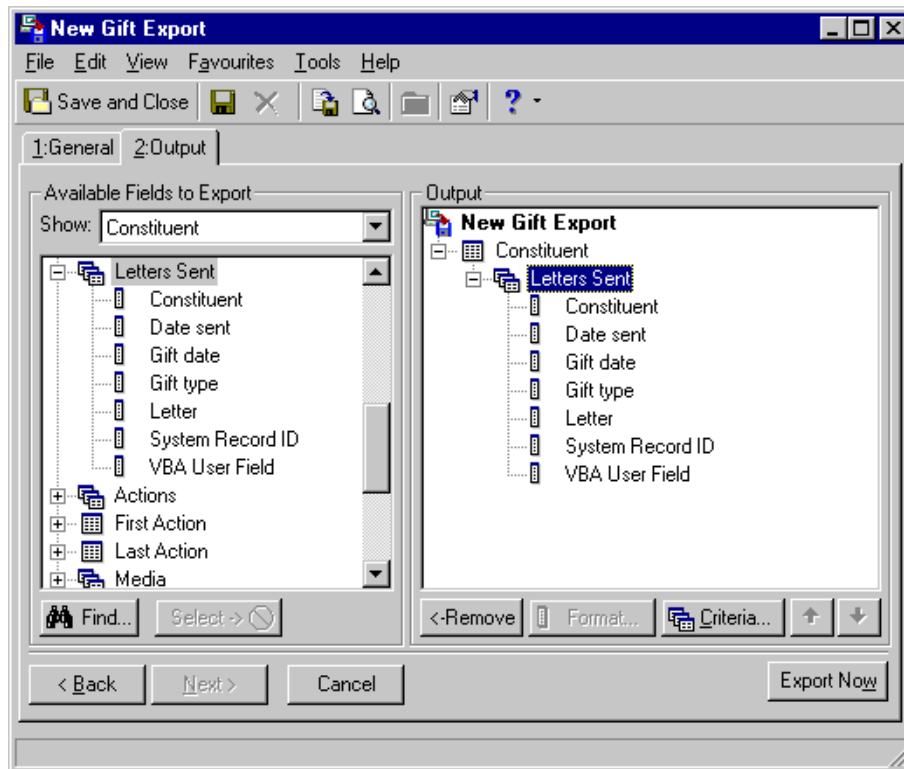
Date Sent

System Record ID

Gift Date

VBA User Field

Gift Type



Reports

On the Reports page, you can access reports to help you analyze your regular supporters program.

- Profiles summarize information contained on your constituent records. On the **Constituent Profile**, **Individual Profile**, and **Organization Profile**, you can include an Amendment History. This can be helpful if you want to see the giving trends for a donor or group of donors over a period of time. You may want to see how many times this fiscal year a particular individual upgraded (or downgraded) her recurring gift. When you set up a constituent, individual, or organization profile, you can enter a heading; decide to whom soft credits should go; select the date for the profile; and decide which campaign(s), fund(s), and appeal(s) to include. To access these

profiles, on the Raiser's Edge bar, click **Reports**. The Reports page appears. Click the **Profiles, Lists, and Directories** button or link. The Profiles, Lists, and Directories page appears. To create a new profile, select the profile type in the list on the left, and click **New** on the action bar. To open a profile that has already been created and saved, select the profile in the grid on the right and click **Open** on the action bar. The Profile screen appears. For detailed information about profiles, see the *Reports Guide* and the *Sample Reports Guide*.

Clara M. Daniels					
Amendment History					
Date	Type	Amount	Frequency	Fund	Appeal
			Solicitor	Campaign	Package
02/02/2005	Recurring Gift	\$20.00	Monthly	International Relief Fund	Annual Newsletter
10/01/2005	Amendment Upgrade	\$25.00	Monthly	Lane A. Pembroke Disaster Relief Campaign; International Relief Fund	Upgrade Appeal
12/31/2005	Amendment Upgrade	\$30.00	Monthly	Lane A. Pembroke Disaster Relief Campaign; International Relief Fund	Year End Appeal
			Cole Hensley	Disaster Relief Campaign;	

- The **Recurring Gift Missed Payment Report** helps you locate the regular supporters you have lost and helps you determine when you lost them. The report shows the gift amounts to which a donor has committed, but not yet paid. It processes information for recurring gifts with consecutive missed payments — the number of payments that have been skipped or missed since the last payment made. You can process this report as a summary report, detail report, or both. You can filter by campaign(s), fund(s), appeal(s), constituent code(s), gift status (all except Completed), pay method, and frequency. You can report on recurring gifts with no payments, recurring gifts with at least one payment, or all recurring gifts, regardless of the number of payments. You can summarize the report by campaign, fund, appeal, package, constituent code, solicitor, and pay method. You can break it down by frequency, campaign, fund, appeal, package, solicitor, and pay method. Along with the constituent name, you can include the constituent ID and a maiden name. From this report, you can also create a constituent or gift output query.

Note: To remove regular supporters who have missed payments consecutively from future mailings, transaction files, etc., you can run the Recurring Gift Missed Payment Report and select to create an output query. Then you can use this query to globally change the appropriate recurring gift records' status to Terminated. For information about **Global Change**, see the *Global Add, Delete, & Change Guide*.

To access the Recurring Gift Missed Payment Report, on the Raiser's Edge bar, click **Reports**. The Reports page appears. Click the **Pledge and Recurring Gift Reports** button or link. The Pledge and Recurring Gift Reports page appears. To create a new report, select **Recurring Gift Missed Payment Report** in the list on the left, and click **New** on the action bar. To open a report that has already been created and saved, select the report in the grid on the right and click **Open** on the action bar. The Recurring Gift Missed Payment Report screen appears. For detailed information about reports, see the *Reports Guide* and the *Sample Reports Guide*.

Recurring Gift Missed Payment Report									
Constituent Name	Gift date	Fund	First payment		Last Payment		Frequency	Total Payments Given	Total Payment Amount
			Date	Amount	Date	Amount			
Anthony S. Ellis	01/01/2006	Building Fund	01/15/2006	\$25.00	04/01/2006	\$30.00	Monthly	4	\$110.00
Benjamin E. Connor	07/23/2006	International Relief Fund	08/15/2006	\$15.00	08/15/2006	\$15.00	Monthly	1	\$15.00
Cynthia T. Miller	07/30/2006	Natural Disaster Relief Fund	09/26/2006	\$5.00	09/26/2006	\$5.00	Monthly	1	\$5.00
Luke J. Thames	01/06/2006	Camp Kids Scholarship	01/15/2006	\$10.00	04/15/2006	\$10.00	Monthly	4	\$40.00
Mary Beth Richardson	07/22/2006	Botanical Garden Fund	08/01/2006	\$10.00	10/01/2006	\$10.00	Monthly	3	\$30.00
Max G. Taylor	06/23/2006	Playground Site	07/07/2006	\$25.00	07/07/2006	\$25.00	Monthly	1	\$25.00
Grand Total								14	\$225.00

- The **Recurring Gift Amendment Report** helps you determine the success rate of your upgrade appeals or campaigns. It can show you who has upgraded or downgraded, when, and how much your donors were previously giving and how much they are giving now. It processes information for amended recurring gifts on a specific date or during a specified date range. You can select to include recurring gifts with amounts that have been upgraded, downgraded, or remained the same; and you can select to process this report as a summary report, detail report, or both. You can filter by constituent code(s), appeal(s), campaign(s), fund(s), and payment type(s). You can summarize the report by campaign, fund, appeal, package, constituent code, solicitor, and pay method. You can break it down by constituent name, amendment month and year, campaign, fund, appeal, solicitor, and frequency. Along with the constituent name, you can include the constituent ID and a maiden name. From this report, you can also create a constituent or gift output query.

To access the Recurring Gift Amendment Report, on the Raiser's Edge bar, click **Reports**. The Reports page appears. Click the **Pledge and Recurring Gift Reports** button or link. The Pledge and Recurring Gift Reports page appears. To create a new report, select **Recurring Gift Amendment Report** in the list on the left, and click **New** on the action bar. To open a report that has already been created and saved, select the report in the grid on the right and click **Open** on the action bar. The Recurring Gift Amendment Report screen appears. For detailed information about reports, see the *Reports Guide* and the *Sample Reports Guide*.

Recurring Gift Amendment Report					
Constituent Name	Amendment Date	Amendment Amount Fund		Variance Amount	Variance Percentage
Anthony S. Ellis	03/01/2003	\$30.00	Building Fund	\$5.00	20.00%
Barrett J. O'Malley	11/01/2004	\$25.00	Botanical Garden Fund	\$3.33	15.38%
Mary Beth Richardson	12/01/2003	\$20.00	Botanical Garden Fund	\$10.00	100.00%
Kyle N. Bell	12/01/2004	\$20.00	Smith-Brown Scholarship Fund	\$10.00	100.00%
Kyle N. Bell	06/01/2005	\$75.00	Smith-Brown Scholarship Fund	\$15.00	25.00%
Kyle N. Bell	10/15/2006	\$80.00	Smith-Brown Scholarship Fund	\$5.00	6.67%
Clara M. Daniels	10/01/2004	\$25.00	International Relief Fund	\$5.00	25.00%
Clara M. Daniels	12/31/2004	\$30.00	International Relief Fund	\$5.00	20.00%
Grand Totals:					
Monthly		\$130.00	\$101.67	\$28.33	27.87%
Quarterly		\$175.00	\$145.00	\$30.00	20.69%
* The amendment changed the frequency of the recurring gift schedule. The previous amount was recalculated based on the new frequency					

- Statistical reports provide you with a breakdown of how many constituents have a specified field value, how many gifts they gave, and how much money they donated. The exact data included depends on your parameter tab settings. The **Recurring Gift Statistical Report** can help you find the regular supporters you have lost and help you better target future donors. You can determine statistics such as how many donors were lost per month; which gender or age group is giving the most money; which gender or age group is less likely to continue giving; or from which ZIP code, county, or region you are receiving the highest donations.

The report processes information for the gift date you decide to use (Gift date or GL post date) and gifts on a specific date or during a specified date range. You can select to use all fields you normally use on a **Raiser's Edge** statistical report, with the addition of **Gift payment method**, **Gift frequency**, and **Gift package**. You can filter by fund(s), appeal(s), constituent code(s), campaign(s), and payment type(s). You can select a maximum of 10 columns, such as number of constituents; number of constituents with an active recurring gift; number of active recurring gifts; total number of recurring gifts cancelled/terminated; number of recurring gifts cancelled/terminated with or without payments; total number of new recurring gifts; number of new recurring gifts with or without payments; average payments given for new recurring gifts; total number of recurring gift payments; total amount of missed recurring gift payments; total number of amended recurring gifts; number of recurring gifts that were upgraded, downgraded, or remained the same; and number of cancelled/terminated recurring gifts/number of active recurring gifts. You can also set report limits based on certain factors. To help explain complicated data, you can also produce a bar or pie graph of the report results.

To access the Recurring Gift Statistical Report, on the Raiser's Edge bar, click **Reports**. The Reports page appears. Click the **Demographic and Statistical Reports** button or link. The Demographic and Statistical Reports page appears. To create a new report, select **Recurring Gift Statistical Report** in the list on the left, and click **New** on the action bar. To open a report that has already been created and saved, select the report in the grid on the right and click **Open** on the action bar. The Recurring Gift Statistical Report screen appears. For detailed information about reports, see the *Reports Guide* and the *Sample Reports Guide*.

Recurring Gift Statistical Report broken down by constituent Gender field

Recurring Gift Statistical Report						
	No. of constituents	Constituents with an active rec. gift	Percent of participation	New rec. gifts	Payments for new rec. gifts	Avg. payments for new rec. gifts
Female	5	4	80.00 %	3	\$70.00	\$8.75
Male	5	4	80.00 %	4	\$90.00	\$6.00
	10	8	80.00 %	7	\$160.00	\$6.95

Recurring Gift Statistical Report broken down by Gift payment method field

Recurring Gift Statistical Report					
Gift payment method	New rec. gifts	Payments for new rec. gifts	Avg. payments for new rec. gifts	Total rec. gift payments	Avg. rec. gift payments
Credit Card	1	\$30.00	\$10.00	\$35.00	\$17.50
Direct Debit	2	\$110.00	\$22.00	\$35.00	\$17.50
	3	\$140.00	\$17.50	\$70.00	\$17.50

Dashboard

Recurring Gift dashboard panels provide missed payment information about your regular supporters' recurring gifts and summary information about amendments to your recurring gifts. Two Recurring Gift dashboards are available in *The Raiser's Edge*: Recurring Gift Missed Payment Summary and Recurring Gift Amendment Summary. To access these dashboards, on the Raiser's Edge bar, click **Dashboard**. The Dashboard page appears. To create a new dashboard page, click **New** on the action bar. The Customize Dashboard page appears. The Recurring Gift Missed Payment Summary and Recurring Gift Amendment Summary appear under the **Gift** category. For detailed information about *Dashboard*, see the *Dashboard Guide*.

The screenshot shows the 'The Raiser's Edge' application interface. The top menu bar includes 'File', 'Edit', 'View', 'Go', 'Favorites', 'Tools', and 'Help'. Below the menu is a navigation pane on the left with icons for Home, Records, Query, Export, Reports, Mail, Batch, Admin, Config, Scanning, NetSolutions, and Dashboard. The main content area is titled 'Dashboard' and contains two summary panels.

Recurring Gift Missed Payment Summary
As of 08/21/2008 1:30:15 PM

Pay Method	No. Constituents	No. Gifts	No. Payments Given	No. Payments Missed	Total Amount Missed
Credit Card	2	2	5	10	\$130.00
Direct Debit	4	4	11	29	\$545.00
	6	6	16	39	\$675.00

Recurring Gift Amendment Summary
As of 08/21/2008 1:21:56 PM

Appeal	Amount	Previous Amount	Variance	Variance Percentage
Internet/Web Site solicitations	\$20.00	\$10.00	\$10.00	100.00%
Upgrade Appeal	\$30.00	\$25.00	\$5.00	20.00%
	\$50.00	\$35.00	\$15.00	42.86%

Welcome to The Raiser's Edge 7

- The **Recurring Gift Missed Payment Summary** shows unrealized payments for recurring gifts — the gift amounts to which your donors have committed, but not yet paid. This dashboard processes information for recurring gifts with consecutive missed payments. Consecutive missed payments are the number of payments that have been skipped or missed since the last payment made. You can report on recurring gifts with no payments, recurring gifts with at least one payment, or all recurring gifts, regardless of the number of payments. You can summarize this dashboard by campaign, fund, appeal, package, constituent code, solicitor, or pay method. You can break it down by frequency and display a table, graph, or both. For detailed information about the Recurring Gift Missed Payment Summary, see the Gift segment in the Dashboard Panels section in the Working With Dashboard chapter of the *Dashboard Guide*. For detailed information about how to create a dashboard panel, see the Panel Basics chapter of the same guide.

Recurring Gift Missed Payment Summary					
As of 08/21/2008 1:30:15 PM					
Pay Method	No. Constituents	No. Gifts	No. Payments Given	No. Payments Missed	Total Amount Missed
Credit Card	2	2	5	10	\$130.00
Direct Debit	4	4	11	29	\$545.00
	6	6	16	39	\$675.00

Note: An overall downgrade for your recurring gifts displays in the **Variance** column in parentheses to designate the negative amount.

- The **Recurring Gift Amendment Summary** displays summarized information about amendments in your database. For example, you can filter on a particular upgrade appeal for this fiscal year to see if the total amounts of your recurring gifts have gone up, down, or remained the same. You can also see the variance (difference) between the total current amount and the total previous amount of your recurring gifts, and this total change by percentage. You can summarize the dashboard by campaign, fund, appeal, package, constituent code, solicitor, or pay method. You can break it down by frequency and display a table, graph, or both. For detailed information about the Recurring Gift Amendment Summary, see the Gift segment in the Dashboard Panels section in the Working With Dashboard chapter of the *Dashboard Guide*. For detailed information about how to create a dashboard panel, see the Panel Basics chapter of the same guide.

Recurring Gift Amendment Summary					
As of 08/21/2008 1:43:43 PM					
	Appeal	Amount	Previous Amount	Variance	Variance Percentage
<input type="checkbox"/>	Year End Appeal	\$120.00	\$70.00	\$50.00	71.43%
	Frequency	Amount	Previous Amount	Variance	Variance Percentage
	Monthly	\$120.00	\$70.00	\$50.00	71.43%

Mail

In *Mail*, fields exist to help you extract data so you can easily contact your regular supporters. *Mail* makes it easier to correspond with your donors because it can automate many standard processes such as gathering data for mail merges and selecting addresses. You can create letters for many donors at one time. For detailed information about using mail tasks in *The Raiser's Edge*, see the *Mail Guide*.

Donor Acknowledgement Letters

You can use the Donor Acknowledgement Letters mail task to select and export acknowledgement information to create thank-you letters for your regular supporters. You can create many letters at once for a group of donors. You can insert merge fields, such as **Amount last paid** and **Date last payment**, to personalize the letter for each constituent. Using the Donor Acknowledgement Letters mail task, you export the corresponding fields to merge with a letter you have written in an application that supports mail merges. The following section lists fields that can be useful when creating letters for your regular supporters. For information about Donor Acknowledgement Letters, see the Available Mail Tasks chapter of the *Mail Guide*.

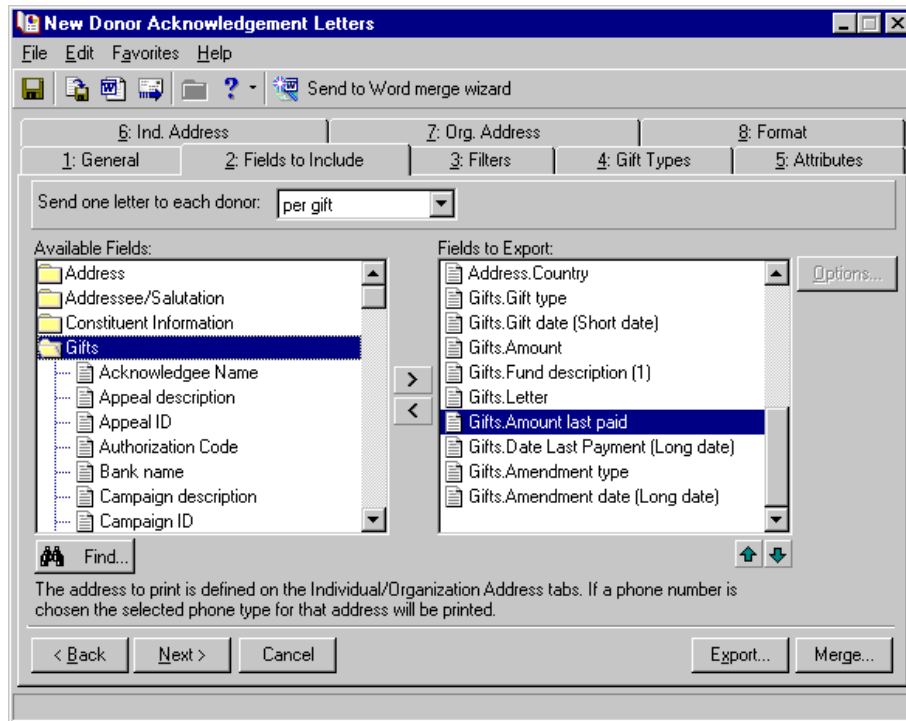
- Fields appear on the Fields to Include tab of the Donor Acknowledgement Letters screen that can be useful when acknowledging your regular supporters. These fields appear in the Gifts folder in the **Available Fields** box. To include these fields, select each one at a time and click the single right arrow to move each field to the **Fields to Export** box. For information about using the Fields to Include tab, see the Fields to Include Tab chapter of the *Mail Guide*.

Amount last paid - This is the amount of the most recently entered cash gift record for a recurring gift template.

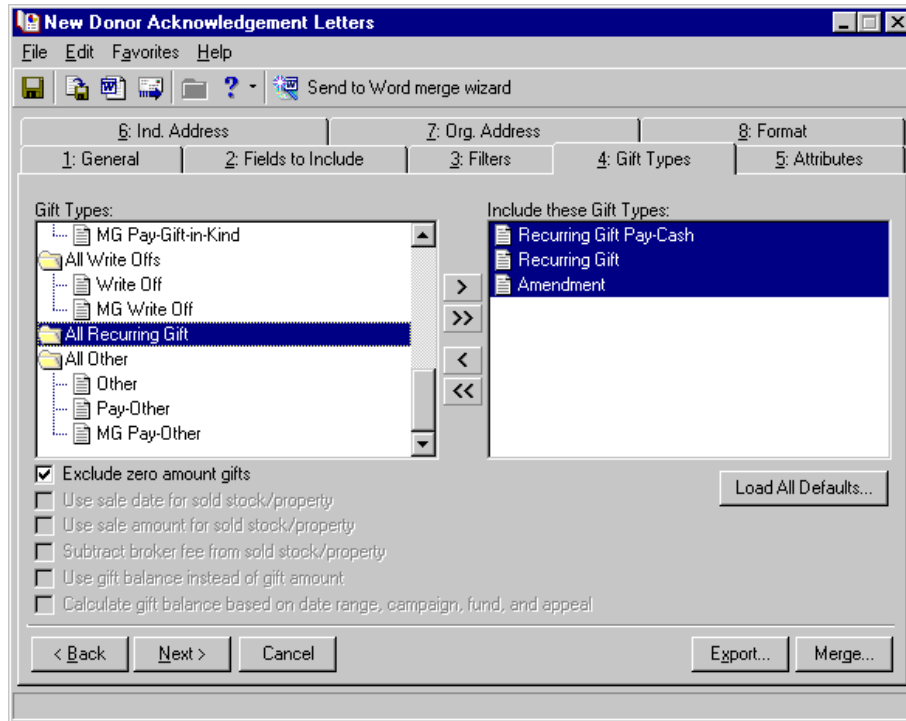
Date last payment - This is the date of the most recently entered cash gift record for a recurring gift template.

Amendment type - The type can be an upgrade, downgrade, or can remain the same. If the gift is not an amended recurring gift, the field will appear blank.

Amendment date - This is the date of the most recently entered amendment record for a recurring gift template.



- On the Gift Types tab of the Donor Acknowledgement Letters screen, an All Recurring Gift group appears. **Recurring Gift** and **Amendment** appear within this group. You can select to move these types from the **Gift Types** box to the **Include these Gift Types** box. Under the All Cash group, you can also select **Recurring Gift Pay - Cash**. You can include these helpful recurring gift mail types in your letters. For information about using the Gift Types tab, see the Gift Types Tab chapter of the *Mail Guide*.



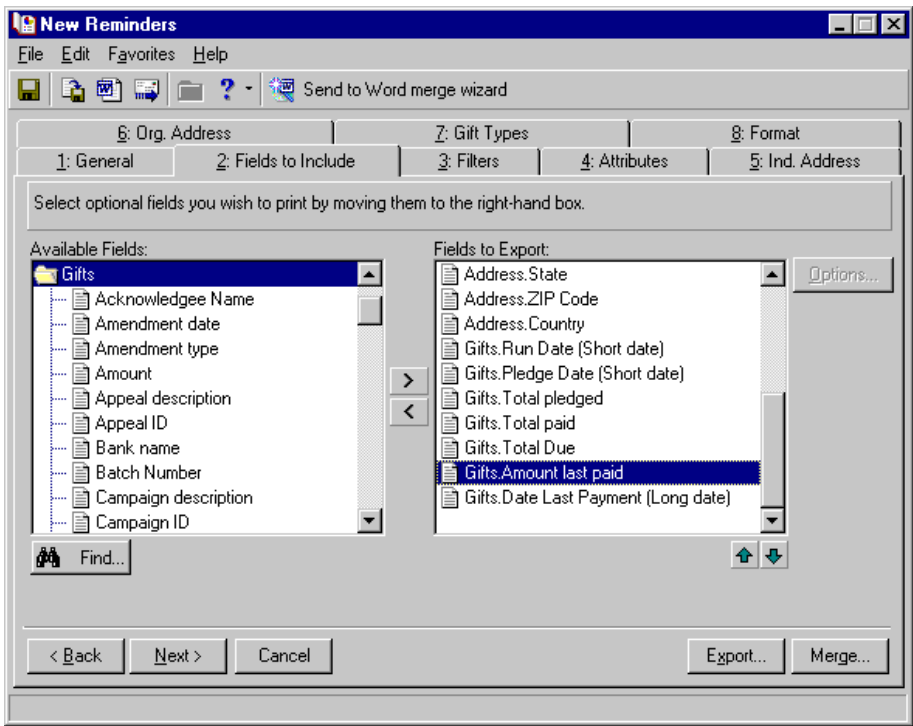
Reminders

You may want to send reminders to your regular supporters who have skipped several payments on their recurring gift commitment. You may be able to improve the financial success of your regular supporters program by kindly reminding these donors of their commitments. You can send a reminder for each recurring gift transaction or a single reminder for the entire recurring gift. The following section lists fields that can be useful when creating reminders for your regular supporters. For information about Reminders, see the Available Mail Tasks chapter of the *Mail Guide*.

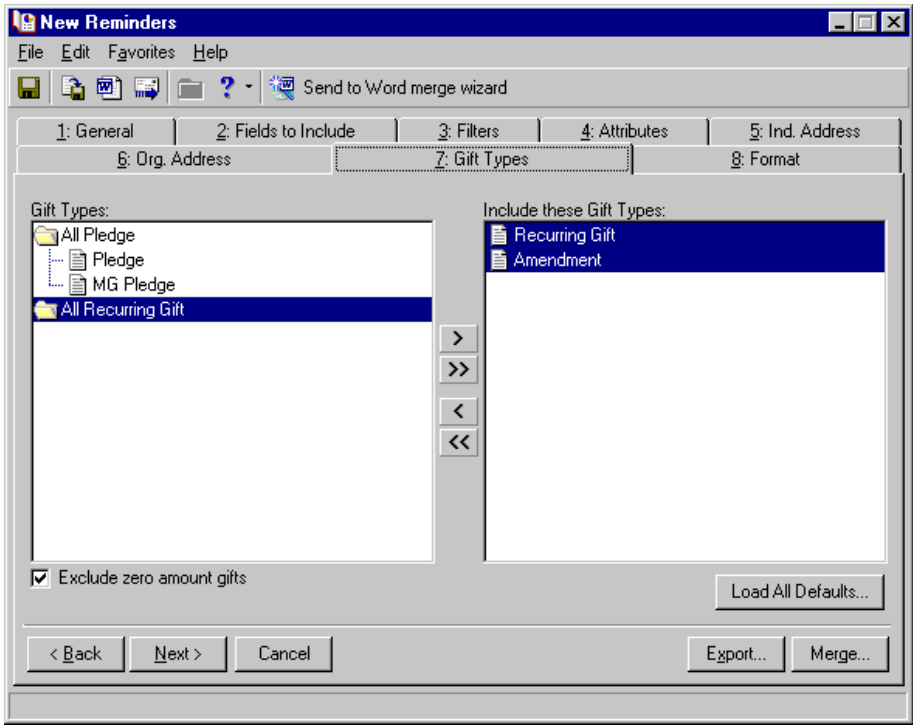
- Fields appear on the Fields to Include tab of the Reminders screen that can be useful when sending reminders to your regular supporters. These fields appear in the Gifts folder in the **Available Fields** box. For the Gifts folder to appear in the **Available Fields** box, you must select "Create custom data file" in the **Reminder type** field on the General tab of the Reminders screen. To include these fields, select each one at a time and click the single right arrow to move the field from the **Available Fields** box to the **Fields to Export** box. For information about using the Fields to Include tab, see the Fields to Include Tab chapter of the *Mail Guide*.

Amount last paid - This is the amount of the most recently entered cash gift record for a recurring gift template.

Date last payment - This is the date of the most recently entered cash gift record for a recurring gift template.



- On the Gift Types tab of the Reminders screen, an All Recurring Gift group appears. **Recurring Gift** and **Amendment** appear within this group. You can select to move these types from the **Gift Types** box to the **Include these Gift Types** box. You can include these helpful recurring gift mail types in your reminders. For information about using the Gift Types tab, see the Gift Types Tab chapter of the *Mail Guide*.



Renewal Notices

The Renewal Notices mail task is available if you use the optional module *Membership Management*. You can print renewal notices for memberships that have lapsed or will lapse. Sending renewal notices can increase your membership retention rate. When a membership is about to expire, you can send a renewal notice to encourage and remind a member to extend a membership. The following section lists fields that can be useful when creating renewal notices for your regular supporters who use recurring gifts to pay their membership dues.

- Fields appear on the Fields to Include tab of the Renewal Notices screen that can be useful when sending renewal notices to your regular supporters. These fields appear in the Gifts folder in the **Available Fields** box. For the Gifts folder to appear in the **Available Fields** box, you must select "Create custom data file" in the **Notice type** field on the General tab of the Renewal Notices screen. To include these fields, select each one at a time and click the single right arrow to move the field from the **Available Fields** box to the **Fields to Export** box. For information about using the Fields to Include tab, see the Fields to Include Tab chapter of the *Mail Guide*.

Amount last paid - This is the amount of the most recently entered cash gift record for a recurring gift template.

Date last payment - This is the date of the most recently entered cash gift record for a recurring gift template.

Amendment type - The type can be an upgrade, downgrade, or can remain the same. If the gift is not an amended recurring gift, the field will appear blank.

Amendment date - This is the date of the most recently entered amendment record for a recurring gift template.

