

Blackbaud. The Raiser's Edge®

Welcome to **The Raiser's Edge 7.91**. Before you begin to use the program, please take a moment to review the following notes, which highlight some of the new features and enhancements. It is important to share this information with all Raiser's Edge users in your organization. A shortcut to the *Release Notes* for **The Raiser's Edge** has been added to your desktop, so you can access these notes at any time.

Blackbaud Payment Service

- To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), **The Raiser's Edge** now uses the Blackbaud *Payment Service* to securely store your recurring credit card and merchant account information. In your database, **The Raiser's Edge** stores reference tokens generated by the Blackbaud *Payment Service* to identify your credit card numbers.
- **The Raiser's Edge** requires Internet access to connect to the Blackbaud *Payment Service* for the secure storage of credit card or merchant account information.
- In the **Credit Card No.** field, **The Raiser's Edge** displays a masked credit card number, with only the last four digits visible. For one-time credit card transactions, the program stores only the last four digits and sends no information to the Blackbaud *Payment Service*.
- If a credit card number has been sent to the Blackbaud *Payment Service* and can be used to process transactions, the number displays asterisks (*) for the masked digits. If a credit card number cannot be used to process transactions, question marks (?) appears for the masked digits.
- If your organization chooses not to use the Blackbaud *Payment Service*, you cannot store credit card or merchant account information in **The Raiser's Edge**. For information about other steps your organization can take to comply with PCI DSS, see the *Payment Application Data Security Standards Implementation Guide*.

Password Options

- To help you comply with the PCI DSS, **The Raiser's Edge** now requires strong and complex passwords. Passwords are case-sensitive and require both alphabetic and numeric characters. Passwords can be up to 50 characters in length, but must have a minimum of eight characters.
- For additional security, in *Configuration*, you can now set business rules to require users to change their passwords on a routine basis such as every 90 days. New passwords created by users cannot match one of the last four passwords used by the user.
- For more information about password requirements and expiration, see the *Configuration and Security Guide*.

User Account Lockout

- To help protect your database, **The Raiser's Edge** can now automatically lock out a user account for a period of time after a number of failed login attempts. In *Configuration*, you can now set business rules to specify the number of failed attempts to allow before the program locks the account and the duration the account remains locked.
- In earlier versions of **The Raiser's Edge**, passwords were not case-sensitive and saved as all capital letters. To avoid locked user accounts, we recommend users press **CAPS LOCK** on their keyboards to ensure they enter passwords in all capital letters when they first log into **The Raiser's Edge 7.91**.
- To help protect your database, **The Raiser's Edge** now automatically logs out a user when a session is idle for 15 minutes. To activate the workstation, the user must enter the password again.
- For more information about user account lockout, see the *Configuration and Security Guide*.

SQL Server Compatibility

- **The Raiser's Edge 7.91** requires Service Pack 3 or higher for *Microsoft SQL Server 2005 Standard, Workgroup, or Enterprise*.
- **The Raiser's Edge 7.91** is now compatible with *Microsoft SQL Server 2008* and *SQL Server 2008 Service Pack 1*.

Constituents

- On the Bio 2 or Org 2 tab of a constituent record, **The Raiser's Edge** no longer displays unmasked credit card numbers. In the credit card grid, the **Credit Card No.** column now displays masked credit card numbers, with only the last four

digits visible. The credit card grid also now includes a **Cardholder Name** column. The Blackbaud *Payment Service* requires the card holder name when it receives new or edited credit card information from *The Raiser's Edge*.

- When you save a constituent record that contains new or edited valid credit card information, *The Raiser's Edge* automatically sends the information to the Blackbaud *Payment Service* for secure storage. For more information, see the *Constituents Data Entry Guide*.

Gifts

- On the gift record, *The Raiser's Edge* no longer displays unmasked credit card numbers. The **Card no.** field now displays masked credit card numbers, with only the last four digits visible. The Blackbaud *Payment Service* requires the card holder name when it receives new or edited credit card information from *The Raiser's Edge*.
- When you save a gift record for a pledge or recurring gift that contains new or edited valid credit card information, *The Raiser's Edge* automatically sends the information to the Blackbaud *Payment Service* for secure storage. For more information, see the *Gift Records Guide*.

Electronic Funds Transfer

- If you use the optional module *Electronic Funds Transfer* to generate transmission files to process credit card payments through IATS/Ticketmaster or ICVerify, *The Raiser's Edge* no longer includes unencrypted credit card numbers in the transmission files. The transmission files generated by *The Raiser's Edge* now contain the reference tokens generated by the Blackbaud *Payment Service* to identify the credit card numbers.
- If you process credit card transactions through IATS, *The Raiser's Edge* now sends the transmission file to the Blackbaud *Payment Service*, which then securely replaces the tokens with their corresponding credit card numbers and sends the complete file to IATS for authorization and processing.
- If you process and authorize direct debit transactions through IATS, *The Raiser's Edge* now receives a response file with a rejection code from IATS to indicate the reason a funds transfer fails, such as an invalid account number.
- If you process credit card transactions through ICVerify, *The Raiser's Edge* securely retrieves the credit card numbers from the Blackbaud *Payment Service* and immediately encrypts the transmission file with the ICVerify *EncryptionManager* utility. To help you comply with PCI DSS, you can no longer obtain a copy of the unencrypted credit card transmission file through *The Raiser's Edge*. For more information, see the *Electronic Funds Transfer (EFT) Guide*.

Export

- Under the **Credit Cards** node, a new **Card Token** field exists. Select this field to export the string of characters used to identify the credit card number in the Blackbaud *Payment Service*.
- When you export an existing credit card number, it now automatically exports as a masked number, such as a string of asterisks that end with the last four digits of the credit card number. You can no longer export unmasked credit cards numbers.
- In *Export*, you can now select to export one or more specific attribute descriptions. For example, for the **Interests attribute** category, you can select to export the attribute descriptions **Biking**, **Fishing**, and **Tennis**. This enhancement only applies to attributes with a data type of table.

Mail

- To help you comply with PCI DSS, you can no longer create mailings that display unencrypted credit card numbers. You can now output only masked credit card numbers in mailings generated in *The Raiser's Edge*.
- If you use the optional module *PostalSaver*, you can now generate barcodes for mailings that meet the requirements of the US Postal Service Intelligent Mail® barcode. For more information, see the *Mail Guide*.

Mapping

- *The Raiser's Edge* is now compatible with Microsoft *MapPoint 2009* in addition to *MapPoint 2006*. For information about integration with *MapPoint*, see the *Mapping Guide*.

Batch

- When you enter or edit credit card information in a constituent or gift batch, *The Raiser's Edge* automatically sends the information to the Blackbaud *Payment Service* for secure storage when you leave the row in the batch entry grid.
- If you select **Tools, Authorize Credit Card Transactions** from the menu bar to generate a request file to process credit card payments in a gift batch, your batch must now include the new **Cardholder Name** field. *The Raiser's Edge* no longer includes unencrypted credit card numbers in the request files. The request files generated by *The Raiser's Edge* now contain the reference tokens generated by the Blackbaud *Payment Service* to identify the credit card numbers.

If you process credit card transactions through IATS, *The Raiser's Edge* now sends the request file to the Blackbaud *Payment Service*, which then securely replaces the tokens with their corresponding credit card numbers and sends the complete files to IATS for authorization and processing. If you process credit card transactions through ICVerify, *The Raiser's Edge* securely retrieves the credit card numbers from the Blackbaud *Payment Service* and immediately encrypts the request file with the ICVerify *EncryptionManager* utility. To help you comply with PCI DSS, you can no longer obtain a copy of the unencrypted request file through *The Raiser's Edge*. For more information, see the *Batch Guide*.

Administration

- To help you comply with PCI DSS, all credit card numbers appear masked throughout *The Raiser's Edge*, regardless of the personal information security options set for users in *Security*. We recommend you continue to use the Personal Information security options to mask Social Security, bank account, and insurance policy numbers. For more information, see the *Configuration and Security Guide*.
- When you install or update *The Raiser's Edge 7.91*, you can select to send existing credit card and merchant account information in your database to the Blackbaud *Payment Service* for secure storage. To view credit card data that the Blackbaud *Payment Service* cannot accept, such as invalid or incomplete information, you can generate a Credit Card Exception Report. With this static report, you can identify credit card information to correct for submittal and secure storage in the Blackbaud *Payment Service*. When you generate the report, you can select the record types and credit card types to include. To generate the Credit Card Exception Report, click **Credit Card Exception Report** on the Administration page. For more information, see the *Electronic Funds Transfer (EFT) Guide*.

Import

- If you attempt to import unencrypted credit card information from a plain text file, for security reasons, *The Raiser's Edge* stores your imported credit card information in the Blackbaud *Payment Service*. We strongly recommend you encrypt credit card information in compliance with PCI DSS. The retention of credit card information in an unencrypted file leaves you vulnerable to malicious users.
- Import files generated by *The Raiser's Edge* provide only masked credit card numbers.
- In a constituent import, you can now include the new **Cardholder Name** field. For more information, see the *Import Guide*.

Configuration

- You can now manage your merchant accounts in Business Rules. If you use IATS/Ticketmaster to process credit card transactions, you must set up a merchant account. To add or edit a merchant account in *Configuration*, click **Business Rules** and select **Merchant Accounts** from the tree view. On the Business Rules screen for merchant accounts, the grid displays all the merchant accounts your organization uses with the Blackbaud *Payment Service*. Since your organization may use a merchant account with another Blackbaud program, you can add or edit merchant accounts that appear in the grid, but not delete them. When you save new or edited merchant account information, *The Raiser's Edge* automatically sends the information to the Blackbaud *Payment Service* for secure storage.
- On the Business Rules page for mail options, if you use the optional module *PostalSaver*, you can select whether to use the Intelligent Mail® barcode to sort and track mailings with the US Postal Service. For more information, see the *Configuration and Security Guide*.

NetSolutions

- To help you comply with PCI DSS, *NetSolutions* no longer stores credit card numbers locally or in the database. All numbers for recurring gifts are stored remotely in the Blackbaud *Payment Service*. For one-time gifts, *The Raiser's Edge* downloads and stores a truncated credit card number. In addition, retention of credit card information associated with donor logins is no longer possible.
- Merchant Accounts used in *NetSolutions* are now created in **Business Rules**. Once an account is in place, you can associate the account with your entire *NetSolutions* site or a specific *NetSolutions* page (NetDonors, NetEvents, NetMembers) without re-entering the account's credentials.
- For more information about *NetSolutions*, see the *NetSolutions Guide*; for more information about creating merchant accounts in *The Raiser's Edge*, see the Business Rules section of the Configuration chapter in the *Configuration & Security Guide*.

Blackbaud Sphere Integration

- *The Raiser's Edge* is now compatible with Blackbaud *Sphere*. You can now download online transactions and information from *Sphere* to your database in *The Raiser's Edge*.
- In *Administration*, system administrators can assign Security rights to the user roles that access the data downloaded from *Sphere*. For information about how to assign security rights, see the *Configuration and Security Guide*.

Workplace Giving

- On the Pledge Detail tab of a Pledge Envelope, *The Raiser's Edge* no longer displays unmasked credit card numbers. For pledge types of Credit card, Direct bill, Corporate, or Other with a payment method of credit card, the **Card Number** column now displays masked credit card numbers, with only the last four digits visible. The credit card grid also now includes a **Card Holder** column. The Blackbaud *Payment Service* requires the card holder name when it receives new or edited credit card information from *The Raiser's Edge*.
- When you save the pledge envelope record that contains new or edited credit card information, *The Raiser's Edge* automatically sends the information to the Blackbaud *Payment Service* for secure storage. For more information, see the *Workplace Giving Guide*.

Query

- To help you organize queries in category folders, you can now drag and drop queries from the query list into the appropriate category, such as Constituents or Gifts.

Nonprofit Central Web Service

- You can now use the *Nonprofit Central* web service to view and print information about an organization constituent from the *Nonprofit Central* database from within *The Raiser's Edge*. The *Nonprofit Central* database is available to community foundations who purchase an annual subscription. For information about how to set up this service in *The Raiser's Edge*, see the *Web Services Installation and Set Up Guide*.