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We are pleased to send you **The Raiser's Edge 7.5**. Before you begin using the program, take a moment to review the following notes, which highlight a few of the new features. 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.

## New Feature Highlights:

- The **Raiser's Edge** "shell" provides a central area where you can access all main parts of the program. You will notice some changes to the shell in version 7.5. For example, the shell now includes **Back** and **Forward** buttons you can use to navigate pages you have already visited. Additionally, you can click the **Open in separate window** button to open a page outside the shell.

- The Home page - the one main location for your most frequently accessed information - has been enhanced for version 7.5.

    - The **Constituent Quick Find** field is now available to help you easily locate constituent records.

    - You can now send e-mails, write letters, and add notepads from the Home page.

    - You can place your most important Dashboards on the Home page. For more information about Dashboards, see the Dashboard Guide.

    - If you have many Favorites, you now have the flexibility of organizing them in folders on your Home page for easier access.

    - You can add external documents to the Home page, such as Crystal Reports or Microsoft Word documents.

For more information about the Home page, see the Program Basics chapter of the Program Basics Guide.

- **The Raiser's Edge 7.5** is tightly integrated with Microsoft Office versions 2000 and XP.

    - Enhanced integration with Microsoft Word greatly simplifies Mail Merges. Simple and Conditional mail merges with Word can now be created from within Export using the Word Wizard. All setup is performed within **The Raiser's Edge**. Once the setup is complete, you can perform the merge with the click of a button.

    - With the Outlook Integration feature, you can automatically add and link constituent, action, appeal, and event records (if you have the optional module RE:Event) to Outlook contact, task, or appointment records. Additionally, you can link Outlook records to existing or new **Raiser's Edge** records. Once records are linked, you can synchronize the two programs so changes made in one are automatically updated in the other.

    - You can now use Excel's PivotTables function in **The Raiser's Edge**. If you need a custom report (one that may include information not traditionally provided in **Raiser's Edge** reports), your solution may be to create a "Pivot Report." Using Pivot Reports, you can create custom views of your information by dragging and dropping fields from a query. With these interactive reports, you can analyze data and create summaries and reports.

  For more information about all three of these features, see the The Raiser's Edge & Microsoft Office Integration Guide.

- Custom View is now available to create a tailored view showing only the information you want to see for individual and organization constituent records. By creating these customized screens in Configuration, you can select and view only what is important and functional for your organization. You can pull information from anywhere in the constituent record - including gift history, relationships, notes, and more - and place it on one screen for easy viewing. Custom View requires Internet Explorer 6, which is installed with your **Raiser's Edge 7.5** update. For more information, see the Custom View Guide.

- Sample queries, exports, custom reports, and more are available with **The Raiser's Edge 7.5**. These are actual working examples for use with your live database. To access the sample installer and view all the samples, from the shell menu, select

**Tools**, **Install Samples**. For more information, see the Program Basics chapter of the Program Basics Guide.

- Enhancements to Batch include a new type of batch available if you have the optional module RE:Volunteer. Time sheet batches enable you to add multiple volunteer time sheets to the database at once.

  Other enhancements to Batch include additional hotkeys for menu options and additional fields for a constituent batch and the Constituent Window. You can also sell stock in a gift batch and use a new batch user option to easily create a scanning batch. For more information about these and other Batch enhancements, see the Batch Guide.

- Import now automatically includes all required fields when you create an import file. For more information, see the Import Guide.

- You can now associate actions with appeal records and associate events with campaigns (if you have the optional module RE:Events). Additionally, a Solicitors tab has been added to campaign and fund records to help you more easily manage your solicitors for those records. For more information, see the Campaigns, Funds, & Appeals Data Entry Guide. For information about making constituents solicitors, see the Solicitors chapter of the Constituent Data Entry Guide.

- Dashboard enhancements include the addition of many new Dashboards, such as the Donor Giving Analysis, which enables you to quickly view **Repeated**, **Increased**, **New**, **Recovered**, and **Decreased** donor information. Additionally, a **Cancel** button is now available so you can stop processing at any time. For more information, see the Dashboard Guide.

- Mail is no longer divided into three categories. All mail tasks can now be accessed directly from the Mail page in the shell. Additionally, if you use packages to track and analyze the profitability of different solicitations within your appeals, you can now include the package information on the Segment tab in Mail. Constituent records are updated with package information when you run the mail task. For more information, see the Mail Guide.

- You can now use business rules to automate a variety of settings when you have to mark a constituent as deceased. The deceased constituent business rules enable you to automatically uncheck the **Send mail?** checkbox on all the deceased's addresses, make the deceased's spouse a constituent if not one already, and more. For more information, see the Configuration chapter of the Configuration & Security Guide.

- When you send an e-mail or letter to a constituent, an action can now be automatically added to that constituent's record. A constituent business rule determines whether an action is created when an e-mail is sent to a constituent or to a relationship of a constituent. To learn more about this business rule, see the Business Rules section of the Configuration chapter of the Configuration & Security Guide.

  Additionally, when you send a letter to a constituent using Word merge, you can specify from the Word document to save the document as an action on the constituent's record. For more information, see the Constituent Data Entry Guide.

- Users of the network version of **The Raiser's Edge** should note changes in the Blackbaud Management Console (BMC). When network users update the BMC on their server, the deployment package now updates automatically. You no longer need to open the BMC and run a separate update for the deploy package. When users log into their workstations, a message appears, telling them the software was updated and they must update their workstation. Additionally, from the console you can now view and disconnect users, and schedule backups. For more information, see the Database Administration Guide.

- **The Raiser's Edge 7.5** supports Seagate Crystal Reports 8.5. The Crystal Reports update CD is included with your **Raiser's Edge 7.5** update package. Before installing the 8.5 version of Crystal Reports, you must uninstall any earlier versions of the software existing on your computer. For more information, see the 7.5 Update Guide.

- In version 7.5 for **Canada**, **Australia**, and **New Zealand**, several changes have been made throughout the program to support multiple Receipt Stacks. If you use different types of receipts, such as preprinted and e-receipts, these are considered separate receipt stacks. **Please note that these changes appear only in the Canadian, Australian, and New Zealand versions of The Raiser's Edge.** For more information, see the Receipting Guidelines for Canada and the Receipting Guidelines for Australia & New Zealand.

- For information about all the new features in **The Raiser's Edge** version **7.5**, see the 7.5 Update Guide.

## Documentation Enhancements