The Raiser's Edge™

Configuration & Security Guide

Contents

What Is In This Guide?

In the *Configuration & Security Guide*, you learn how to establish settings that affect all ***Raiser's Edge*** users. You can learn about the following.

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How Do I Use These Guides?

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

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

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

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

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

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

Configuration

Procedures

Your selections in *Configuration* affect functions, defaults, and settings throughout *The Raiser's Edge*. Use *Configuration* options to speed data entry, increase the efficiency of your record keeping, and generally optimize the performance of the program.

Want to know "More About Configuration" on page 5? Want to know about "Configuration Links" on page 5?

More About Configuration

You can define addressees and salutations; rename fields and change their characteristics by making them hidden, required, or lookups; and set up tables you can use to enter data quickly and consistently in all areas of the program. Create business rules to control a wide variety of functions such as defaults for adding gifts and messages to appear when you open or add certain records. Use *Configuration* to identify letters in your word processor for merges with *Raiser's Edge* fields in your mailings, enter financial institution information, and specify currency and address block formatting information for other countries. You can also customize the program by creating special categories of information called attributes and attaching them to your records.

If you have the optional module *Membership Management*, you can set up membership categories to establish different giving levels for your memberships and use the categories to analyze all aspects of your memberships in reports. If you have Blackbaud's *General Ledger*, you can configure a link between the two programs which enables you to enter gifts a single time for both programs instead of into each separately. This dramatically reduces time spent on gift entry. If you do not have *General Ledger*, you can store account information from other accounting software in *The Raiser's Edge*.

Configuration and *Security* are closely linked. You should limit *Configuration* security access to only those with Supervisor rights. The **Business Rules** link is automatically accessible only to users with Supervisor rights. With table entries in particular, it is important you limit access to adding and editing rights to maintain consistency in your database.

Because your selections affect everyone who uses the program, proper configuration plays a key role in allowing your organization to take full advantage of all the features *The Raiser's Edge* has to offer. If you take time now to customize *Configuration* to meet your specific needs, you can increase your organization's future efficiency.

Want to know about "Configuration Links" on page 5?

Configuration Links

Note: You can also access *Configuration* by selecting **Go**, **Configuration** from the shell menu bar.

To access *Configuration*, on the Raiser's Edge bar, click **Config**. The Configuration page appears.
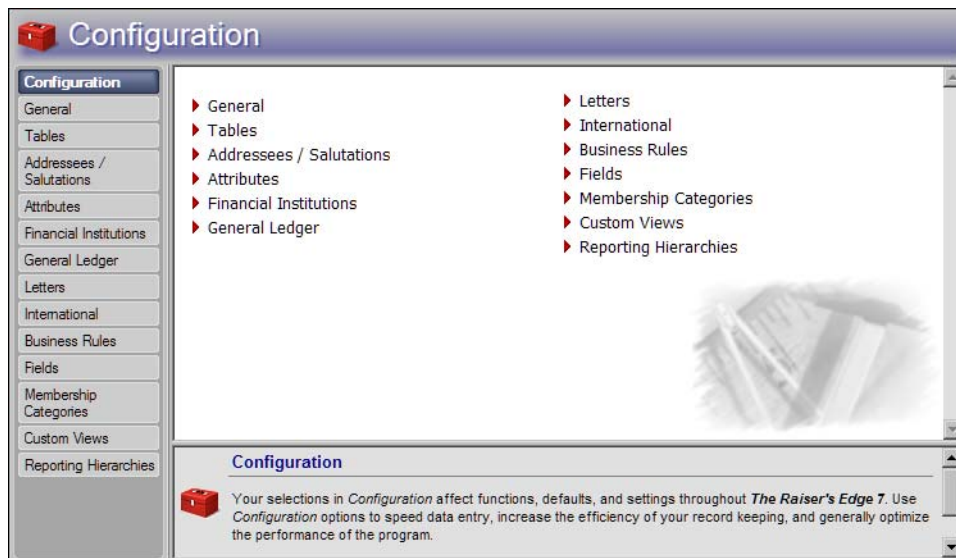
The Configuration page contains the following links:

General. Click this link to add and edit your organization address, phone, company ID, and fiscal year information. If you have the optional module *Volunteer Management*, you can also add information about your volunteer year. Want to know more about the "General" on page 8 link?

Tables. Tables are fields where you can predefine entries to save time and promote consistency for your data entry. Click this link to add, edit, and delete entries for all tables in the program and to create new Donor Category tables. Although this link provides a central location for all table functions, if you have security rights, you can add and edit table entries from anywhere in the program. You can also make table entries inactive to ensure they are not used on any additional records. Want to know more about the "Tables" on page 10 link?

Addressees/Salutations. An addressee is how a constituent name appears on mailing labels, reports, and the inside address of letters. A salutation is how you greet a constituent in letters or other mailings. For example, an addressee could be "The Honorable H. B. Smith," while the salutation is [Dear] "Judge Smith." Click this link to add, edit, and delete addressee/salutation formats for mailings and reports. Want to know more about the "Addressee/Salutations" on page 45 link?

Attributes. Attributes are bits of useful information you can attach to a record. Because you create attributes, you can use them to customize *The Raiser's Edge* to suit your organization's specific needs. Define categories of useful information and create entries within these categories to include with your records. For example, you can create a category called "Interests" with entries for "Golf", "Tennis", and "Photography". You can then use this information to target your appeals. For example, you can make sure all constituents with an interest in golf are invited to play in your annual golf tournament. Want to know more about the "Attributes" on page 54 link?

Financial Institutions. Click this link to add and edit address, phone, and branch information for banks. If you have the optional module *Electronic Funds Transfer*, you can define information to be used to process direct debit transactions. Want to know more about the "Financial Institutions" on page 60 link?

General Ledger. If you have Blackbaud's *The Financial Edge* accounting software, you can click this link to establish a connection between it and *The Raiser's Edge*. The integration of the databases of the two programs maximizes your gift entry efficiency and allows you to enter gifts once for both programs. You can also define General Ledger distributions that default onto new fund records. If you do not have Blackbaud's *The Financial Edge*, you can click this link to store account information from other accounting software in *The Raiser's Edge*. Want to know more about the "General Ledger" on page 66 link?

Letters. On the Letters page, add letters for your mailings and give them corresponding descriptions in *The Raiser's Edge*. You can select existing, or create new exports containing *The Raiser's Edge* fields you want to include in mail merges. If you have *Microsoft Word*, you can use the *Office* integration features of *The Raiser's Edge* to create *Word* documents containing the merge fields in your export for your mailings. Want to know more about the "Letters" on page 73 link?

International. You can define address formats and currency settings for other countries. These formats are used when you enter the country in an address for a constituent. You can enter exchange rate information so *The Raiser's Edge* converts gifts given in foreign currencies to the currency amount of the country where your organization is located. Want to know more about the "International" on page 82 link?

Business Rules. Business rules are ways for you to control functions and displays throughout *The Raiser's Edge*. Business rules affect all users of the program. Using pre-defined rules, you can mark a series of checkboxes to affect functions such as how ID numbers for records are generated, how you define duplicate records, and who receives soft credit for gifts in reports and mailings.

Use queries to define your own rules for messages to display when certain constituent records are opened, or gift or action records are added. For example, you can run a query that includes all your board members, then use it to create a rule that appears when a board member record is opened advising you to handle the record with extreme care. Want to know more about the "Business Rules" on page 86 link?

Fields. (visible only to users who have been given Supervisor rights in **Security**). Fields are areas where you enter information into *The Raiser's Edge*. You can click this link to change field status from optional to required, so a field must have an entry before a record can be saved. You can hide fields you do not use to make them invisible to your users. You can also change fields from standard to lookup. You can define standard entries for lookups like you do for tables. Once you make a field a lookup, it appears in the list of tables in the **Tables** link. Want to know more about the "Fields" on page 131 link?

Membership Categories. (visible only if you have *Membership Management*). A membership category defines the level of giving required by a constituent to gain membership in one of your categories or clubs. For example, you can establish categories for "Lifetime Member", "Corporate Member", and "Individual Member". Want to know more about the "Membership Categories" on page 134 link?

Interfund Entries. (visible only if you have Blackbaud's *General Ledger* and established a connection between it and *The Raiser's Edge* from the **General Ledger** link of *Configuration*.) If the first two numbers of a *General Ledger* debit and credit account are different, the *General Ledger* funds to which they belong are different. In this case, you must specify an interfund transfer account. Click this link to specify a pool of transfer accounts between *General Ledger* funds that you can enter easily and quickly on the GL Distribution grid of *The Raiser's Edge* fund records. To learn more about transfer accounts, see the *General Ledger User's Guide*. Want to know more about the "Interfund Entries" on page 146 link?

Custom Views. Use custom views to create a customized view of constituent records in your database, making it possible to view records that contain only the information you want to see. With these customized screens, you can select and view only what is important and functional for your organization. Every field currently available on a constituent record may not be useful to you. Using *Custom View*, you can easily select and organize only the fields you want to appear for a constituent record. For more information, click **Custom Views** on the Contents tabsee the *Custom Views Guide*.

Reporting Hierarchies. Reporting Hierarchies enable you to group funds into hierarchies that are independent of the Giving Hierarchies you establish in campaign records. On the Reporting Hierarchy page, you can create and modify reporting hierarchies. For more information, see "Reporting Hierarchies" on page 148.

Toolbars

Some screens in *Configuration* contain toolbar buttons to help you carry out commands quickly and easily without having to use the menu bar. If you have security rights to change user options, you can mark the **Show Tooltips** checkbox on the General tab of User Options so a description of the button's function displays when you move the cursor across it.
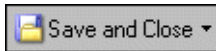
Save and close the current record (**Save and New** can be accessed from the down arrow beside **Save and Close**. Use **Save and New** to save the record, close the saved record, and open a new record.)

Save the record and keep the record open

Delete selected information

Go to the previous record

Go to the next record

Access help contents

Search for a specific field or record

View Properties

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

General

Use the General page to enter basic information, such as your organization's address and phone number. To determine how information appears in some reports, specify when your organization's fiscal year ends and, if you have the optional module *Volunteer Management*, when your volunteer year starts. If you have *Electronic Funds Transfer*, enter your Company ID number for use with electronic fund transfer transmission files.

▸ **Add or edit general information about your organization**

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

2. Click **General**. The General page appears.

3. In the **Country** field, enter the country of your organization. For a list of possible entries, click the down arrow. The default is the country to which the program is shipped. Your entry here affects certain gift and address record defaults. If you type in a new entry, the program adds the new country to the **International** link of *Configuration* and address formatting remains the same as that of the default entry.

4. In the **Address**, **City**, **State**, and **ZIP** fields, enter the mailing address of your organization. Your entry here appears as the return address on envelopes. In the **Address** field, to start a new line of your street address, press ENTER.

5. In the **Phone number** field, enter the telephone number of your organization, including the area code. This field, unlike other phone type fields throughout the program, has no default formatting. Enter the phone number as you would like it to appear on envelopes and reports.

6. In the **Blackbaud Payment Service Credentials** frame, enter the user ID and password used to connect to the *Blackbaud Payment Service*. To help you comply with the Payment Card Industry Data Security Standard (PCI DSS), *The Raiser's Edge* uses this web service to securely store sensitive credit card information outside of your database.

   If your organization uses *ICVerify* to process credit card transactions through *The Raiser's Edge*, in the **Token** field, enter the security token used to identify your organization in the *Blackbaud Payment Service*.

   If your organization does not use *The Raiser's Edge* to store credit card information or process credit card transactions, you can leave this frame blank.

   To confirm your credentials are correct, click the **Test Connection** button. If your credentials are correct, and you are connected to the internet, a message appears to confirm a successful connection. If you are unable to connect to the *Blackbaud Payment Service*, check your credentials or internet connection.

7. In the **Fiscal year ends** field, select the month your organization's fiscal year ends. Your entry here affects which gifts appear on some summaries and reports. For example, you can break down a Giving Summary to display only gifts from constituents for a certain fiscal year.

8. If you have the optional module *Volunteer Management*, the **Volunteer year starts** field appears. Enter the month and day on which your volunteer year starts. Your entry here defines the beginning of the volunteer year in the Volunteer Summary report. If you leave the field blank, the volunteer year begins with the current system date on your computer.

9. If you have the optional module *Electronic Funds Transfer*, the **Immediate destination** field appears. Enter an eight digit number to be used when you create a transmission file for direct debits with *Electronic Funds Transfer*.

    Even if your bank provides a nine digit Transit/Routing Number, enter only the first eight digits here. ***The Raiser's Edge*** calculates and places the last number of the Transit/Routing Number in the transmission file when it is created.

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

10. If you have the optional module *Electronic Funds Transfer*, the **Company ID** frame appears. Select whether your organization's company ID is its Federal Tax ID or is user-defined, and enter the number in the **ID** field. The Federal Tax ID is numeric only, but an user-defined ID can be alpha-numeric.The program uses the information in this frame to create an electronic fund transfer file with *Electronic Funds Transfer*.

11. To return to the Configuration main page, click **Configuration**. The program automatically saves your selections.

Tables

> **Note**: From the **Fields** link of *Configuration*, you can make a field a "lookup." Like a table, you can create a list of entries for a lookup. The only difference between tables and lookups is that a lookup does not have the down arrow on the right. You must press **F7** on your keyboard to view, add, edit, and delete the entries. The lookup appears in the list of tables on the Tables screen and in the Code Tables section in the **Security** link of *Administration*.

Tables (also called code tables) increase data entry speed and accuracy throughout ***The Raiser's Edge***. When you enter information into a field with a table, you can quickly access a list of possible entries for that field, select an entry, and place it directly into the field rather than typing it in manually.

Want to know "More About Tables" on page 10?

"Add Entries and Tables" on page 11

"Manage Tables" on page 20

"Eliminate Duplicate Table Entries" on page 19

"Donor Category Tables" on page 13

"Benefits Table Entries" on page 14

"Phone Type Table Entries" on page 15

"Awards Table Entries (Available with Volunteer Management)" on page 17

"Ratings Table Entries (Available with Prospect Research Management)" on page 18

More About Tables

Some tables, such as the **State** table, contain predefined values. For others, such as **Campaign Category**, you define the entries. Your use of table entries helps maintain consistency in your data entry. For example, one of your users could enter "10% shop discount" in the **Benefits** table of an appeal record, while another user could enter "ten percent shop disc." With the **Tables** link of *Configuration*, you can make "10% Shop Disc." the standard entry for all your users, thereby making the information easy to retrieve from your database in queries and reports.

To keep your entries uniform, it is extremely important to limit rights for your users to add and edit table entries. You can do this from the **Security** option of *Administration*. Limiting rights to add, edit, or delete table entries to only a few key users is vital to ensure the validity of your database and consistency of your data entry. This increases the accuracy of your records and reports.

A table is identifiable by a down arrow on the right side of a field. You can click the arrow or press **F4** on your keyboard to view a drop-down list of entries for a table. You can also place the cursor in the field and click the down arrow on your keyboard to scroll through the entries. You can enter text directly in the field. If the program does not recognize the text as a valid entry, it asks whether to add the text as a new entry. Finally, you can press **F7** on your keyboard while the cursor is in a table field to access a screen where you can view, add, edit, and delete entries.

In addition to defining entries for existing tables, you can create new Donor Category tables to track cumulative giving levels for your constituents in Donor Category Reports. You can also create new Attribute tables through the **Attributes** link of *Configuration* to associate additional information with your records. For more information, see "Define an attribute" on page 56.

> **Note**: To create a new Attribute table, click the the **Attributes** link of *Configuration*. The new table then appears in the list of tables on the Tables page. On the Tables page you can add new entries.

In a few special instances, you can create new tables to track information for which no field already exists in ***The Raiser's Edge***. For example, when you create a new **Ratings** table entry (available with *Prospect Research Management*), you can create a new table with entries that further define the new **Ratings** entry. If the **Ratings** entry is "Prospects for 2001", you can link it to a new table with entries such as "Good Prospect" or "Potential Major Donor." You can delete only tables you create. To ensure consistency, you cannot rename or delete program-defined table entries. Any tables or table entries you define cannot be deleted if they are used on any records in the program.

"Add Entries and Tables" on page 11

"Donor Category Tables" on page 13

"Benefits Table Entries" on page 14

"Phone Type Table Entries" on page 15

"Awards Table Entries (Available with Volunteer Management)" on page 17

"Ratings Table Entries (Available with Prospect Research Management)" on page 18

Add Entries and Tables

You can add and edit entries for standard tables. Standard table entries require you to enter only a description. Entries for some tables, such as **Phone Types** and **Benefits**, require additional information. You can create and name new Donor Category tables and define entries for them.

▸ **Add a table entry**

> **Tip**: If you have security rights to add and edit tables, you can press **F7** on your keyboard when the cursor is in a field with a table to do so. A screen appears where you can add and edit entries for the table. When you type directly into a field with a table, if ***The Raiser's Edge*** does not recognize your entry, it asks whether to add it as an entry.

You can add entries to a table. Some table entries appear with a long description; others provide the option to display either a long or short description. When you add a new entry, it appears at the bottom of the list of entries for the table.

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

2. Click **Tables**. The Tables page appears.
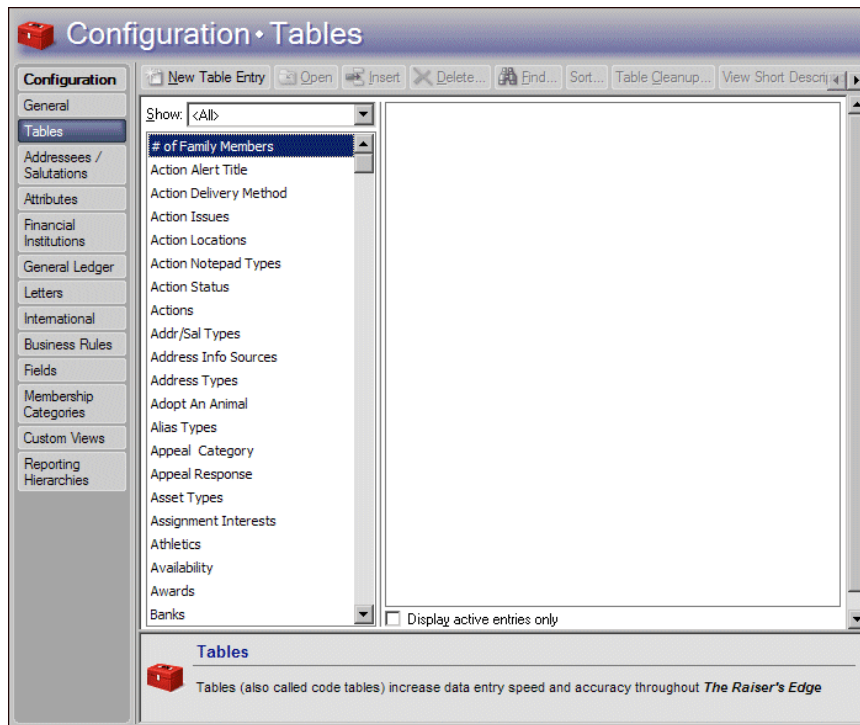
Note: The default entry in the **Show** field is <All>, which lists all tables in the program.

3. To filter the tables that appear in the Tables box, select the type of tables to view in the **Show** field. For example, if you select Biographical, all biographical tables from the constituent record appear in the Tables box.

4. In the Tables box, select the table to which to add an entry. In the Table Entries box, a list of each entry for that table appears. For example, if you select **Constituent Codes** in the Tables box, all entries defined for that table appear in the Table Entries box.

    To not display inactive entries in the Table Entries box, mark **Display active entries only**.

Note: Only **New Table Entry** is enabled for both the Tables box and the Table Entries box, all other action bar options (such as **Open**, **Insert**, and **Delete**) function only for selected entries in the Table Entries box.

5. On the action bar, click **New Table Entry**. The New Table Entry screen appears.
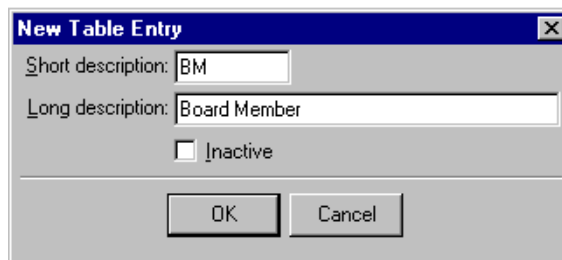
Note: The short description can usually be no longer than six characters. The long description can be no greater than 50 characters.

For some table entries, you define only a description; for others. you must define both a long and short description. For tables with both, you can display either description (see "View table descriptions" on page 26). For example, you can create an entry for the **Constituent Code** table that displays a **Long description** of "Board Member" and a **Short description** of "BM."

With the exception of the **Suffixes** table (used to add suffixes such as ", Jr." and ", Ph.D." to addressee/salutations), table entries cannot begin or end with a space. When you add the entry, any leading or trailing spaces are removed by the program.

Note: Even though you cannot delete table entries that are in use, you can make an entry inactive and mark **Display active entries only** on the Tables page to ensure it is not used again.

6. To make an entry unavailable for use, mark **Inactive**. If you mark **Display active entries only** on the Tables page, the table entry does not appear in the Table Entries box or when the table entries are viewed from another area of the program. When you mark this checkbox, you ensure the entry is not used on any further records without actually deleting it from your database.

7. To save the new entry, click **OK**. The new entry now appears in the Table Entries box on the Tables page. It also lists when you click the down arrow in the table field. The new entry appears at the bottom of the list. To place a new entry in a selected spot in the list, see "Insert a new table entry" on page 21.

Donor Category Tables

Note: Donor categories and Membership categories are not the same. Donor categories define cumulative giving clubs or levels. Membership categories are available only if you have the optional module *Membership Management* and define levels of giving necessary to gain membership in one of your categories or clubs.

Donor Category tables differ from other tables in the program. With Donor Categories, not only can you create new table entries for the three provided tables, you can create and name your own tables. These tables reflect different cumulative giving award categories for your donors and specify a minimum amount a donor must give to become a member of this category.

For example, you can create a donor category called "Major Donors" and for that table, you can create entries for "VIP" with a minimum cumulative giving amount of $10,000, "Benefactor" with a minimum amount of $5,000, and "Friend" with a minimum amount of $1,000.

When you establish donor category tables and entries, you can run a Donor Category report to evaluate your donor levels. For example, you can see how many of your donors fall into the "VIP" category with gifts totaling at least $10,000. For more information about Donor Category reports, see the *Reports Guide*.

• "Add a new Donor Category table" on page 13
• "Add a Donor Category table entry" on page 14

▶ **Add a new Donor Category table**

To add a new Donor Category table"Donor Category Tables" on page 13, you must right-click your mouse in the Tables box.

> *Scenario:* Your university needs to create a donor category for major donors to its annual fraternity Olympics charity fund-raiser. In keeping with the Olympic theme, the category will be called Medalist.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.
2. Click **Tables**. The Tables page appears.

**Note**: The right-click shortcut menu in **Tables** is different from the standard right-click shortcut menu. You can access the New Donor Category screen through this shortcut menu.

3. Place the cursor anywhere in the Tables box, right-click, and select **New Donor Category Table**. The New Donor Category Table screen appears.

4. In the **Name** field, enter "Medalist"the name of your new table.

5. To save the new "Medalist" table, click **OK**. It now lists alphabetically in the Tables box.

▶ **Add a Donor Category table entry**

You can add entries to a Donor Category table"Donor Category Tables" on page 13 the program has defined or to any Donor Category tables you create.

Scenario: Now that you created a new category of donor, you need to establish entries for your new Medalist table. Your school needs to create entries for a "Gold Club" with a minimum cumulative giving amount of $10,000, a "Silver Club" with a minimum amount of $5,000, and a "Bronze Club" with a minimum amount of $1,000.

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

2. Click **Tables**. The Tables page appears.

3. In the Tables box, select Medalistthe table for which to define an entry.

4. On the action bar, click **New Table Entry**. The New Donor Category Table Entry screen appears.

5. In the **Name** field, enter "Gold Club"the name of your new entry.

Note: You do not need to enter a currency symbol in the **Minimum amount** field. It defaults based on the country of your organization entered on the General screen of *Configuration*. Decimal placement and a thousands separator are determined on the International page of *Configuration*.

6. In the **Minimum amount** field, enter the amount $10,000 as thea minimum amount needed to qualify a donor for the new donor category entry. Repeat these steps to create entries for a "Silver Club" and "Bronze Club" with the appropriate minimum amounts.

7. To save the new entries, click **OK**. They now appear in the Table Entries box on the Tables page.

Benefits Table Entries

Benefits table entries differ from standard table entries in the program. You can use these entries to track different premiums, such as tote bags or coffee mugs, your organization gives to constituents based on their giving response to an appeal, or (if you have the optional modules *Membership Management* or *Event Management*) as a reward for the purchase of a membership or the attendance of an event. In addition to a description of the benefit, you must enter its cost.
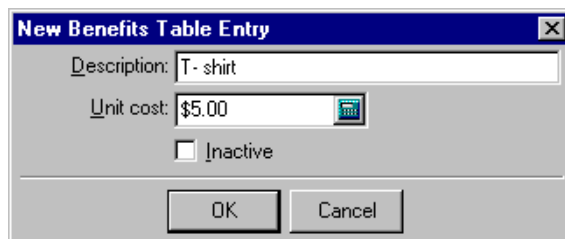
When you edit a **Benefits** table entry, any default benefit already assigned to an appeal or membership is not affected. For example, if you enter a default benefit with a unit cost of $5 for an appeal, when you enter gifts on that appeal, the benefit defaults on the gift with a unit cost of $5. If the cost of the benefit rises to $6 and you update the **Benefits** table, the unit cost of $5 does not change on gifts that already have the benefit, only on new gifts added to the appeal.

▶ **Add a Benefits table entry**

You can add **Benefit** table entries to track the premiums you give to constituents as rewards for giving to your organization.

> *Scenario:* Your organization is giving a t-shirt to each constituent who donates to your annual Spring Phonathon Appeal. You pay $5.00 for each shirt.

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

2. Click **Tables**. The Tables page appears.

3. In the Tables box, select **Benefits**.

4. On the action bar, click **New Table Entry**. The New Benefits Table Entry screen appears.

5. In the **Description** field, enter "T-shirt" a name for the benefit.

6. In the **Unit cost** field, enter the amount $5.00 as of the cost per shirt item.

7. To save the entry, click **OK**. You return to the Tables page. In the Table Entries box, the new entry appears.

Phone Type Table Entries

Phone Type entries differ from standard table entries in that you can establish different phone types and determine how they appear in the program. You can also specify that entries of a specific type can be shared among constituents.

"Sharing Phone Numbers" on page 15

"Phone Number Formats" on page 16

"Add a Phone Type table entry" on page 17

Sharing Phone Numbers

Phone type table entries include a **Do not share phones of this type** checkbox. When you mark this checkbox, phone entries or email addresses of this type cannot be shared among constituents in *The Raiser's Edge*.

When you link (share) addresses, certain rules determine whether phone numbers are shared.

• On a **Phone Type** table entry, when you mark **Do not share phones of this type**, Cannot be Shared appears on records in the **Shared** column in the **Phones/Email/Links** grid beside all phone numbers of that type, and the field is locked.

When you unmark **Do not share phones of this type**, Not Shared, Do Not Share, and Shared appear as selections in the dropdown list of the **Shared** column in the **Phones/Email/Links** grid beside all phone numbers of that type. Not Shared appears as the default until you change the status of a particular phone number.

- When you copy and link (share) an address, all phone numbers designated as Shared in the **Shared** column of the **Phones/Email/Links** grid on the record from which you copy (source record) are copied and shared. All numbers designated as Not Shared change to Shared.

- When you add a phone number that is a duplicate type on a shared address record, the existing number on the shared address record is overwritten.

- You can unlink a phone number at any time by changing the value of Shared in the **Shared** column of the **Phones/Email/Links** grid to Not Shared or Do Not Share.

- If an address is linked and you add a new phone number that is shareable, the number is automatically shared on all linked addresses.

- On a linked address record, beside a phone number in the **Phones/Email/Links** grid, when you change a Not Shared status in the **Shared** column to Shared, the phone number is added to all shared address records.

   On a linked address record, beside a phone number in the **Phones/Email/Links** grid, when you change a Shared status in the **Shared** column to Not Shared, the link for the phone number is broken only for that address record.

- When you break the link between shared addresses, all shared phone numbers change to Not Shared.

- If you change a shareable phone type to not shareable (by marking **Do not share phones of this type**), all links for that phone type on all shared addresses are broken. On records, the status in the **Shared** column in the **Phones/Email/Links** grid beside all phone numbers of that type changes from Shared or Not Shared to Cannot be Shared.

   If you change a not shareable phone type to shareable (by unmarking **Do not share phones of this type**), the status in the **Shared** column in the **Phones/Email/Links** grid beside all phone numbers of that type changes from Cannot be Shared to Not Shared.

Phone Number Formats

Phone type entries contain fields for a type of number and a format. For example, you can create entries for "Home" and "Business" with a format of "#(###)### - #### Ext ####." All the formats contain spaces for extensions. Because home phone numbers usually do not contain extensions, *The Raiser's Edge* formats numbers according to the number of digits you enter.

   Be careful when selecting a phone number format. Different formats can affect query results.

Warning: Be careful when you select a phone number format. Different formats can affect query results. For example, if you run a query to change an area code, you would get different results for numbers formatted with parentheses around the area code and ones formatted without parentheses.

- If you enter seven digits, the program interprets the first three as the prefix and the next four as the number.

- If you enter ten digits, the program interprets the first three as the area code, the next three as the prefix, and the last four as the number.

- If you enter more than ten, but less than sixteen digits, and the first digit is one or zero, the program interprets the first digit as the long distance prefix, the next three as the area code, the next three as the prefix, the next four as the number, and any remaining as the extension.

- If the first digit is not a one or zero, the first three digits are interpreted as the area code with the remainder formatted as in the previous sentence. If the number is not one of the previous examples, *The Raiser's Edge* performs no formatting.

▶ **Add a Phone Type table entry**

You can specify different phone types and format how phone numbers appear throughout the program.

> ***Scenario:*** You need to create a separate entry in the **Phone Type** table for "Business Fax." You want to include an extension number prefaced by "Ext" and parentheses around the area code in the format for the new entry.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.
2. Click **Tables**. The Tables page appears.
3. In the Tables box, select **Phone Types**.

Tip: When you select "Email" as the **Type** in the **Phones** grid on a record and enter an email address, a right-click shortcut menu allows you to send email to that address directly from the record.

4. On the action bar, select **New Table Entry**. The New Phone Type screen appears.

5. In the **Description** field, enter a description such as "Business Fax".

Note: When you enter a phone number on a record, you must also select a **Phone type** before you can save the record.

6. In the **Phone number type** field, click the down arrow and select "Fax Number"an entry.
7. In the **Phone number format** field, click the down arrow and select "#(###)### - #### Ext ####"a format.
8. To not share this type of phone number when you copy and link (share) addresses from one constituent record to another, or from constituent records to relationship records, mark **Do not share phones of this type**.
9. To save the new entry, click **OK**. You return to the Tables page. In the Table Entries box, the new entry appears.

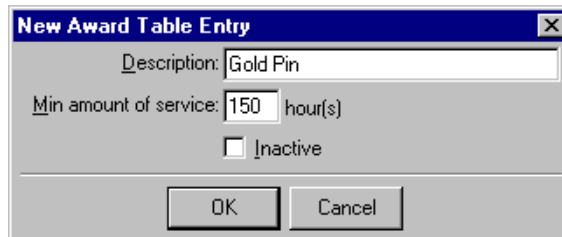## Awards Table Entries (Available with Volunteer Management)

If you have the optional module *Volunteer Management*, the Awards table is available. You can use Awards table entries to define awards you give to volunteers based on the amount of time they donate to your organization.

▶ **Add an Awards table entry**

If you have *Volunteer Management*, you can give awards to your volunteers based on the amount of time they donate to your organization.

> *Scenario:* You need to add a gold pin as an award for volunteers who work at least 150 hours for your organization.

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

2. Click **Tables**. The Tables page appears.

3. In the Tables box, select **Awards**.

4. On the action bar, select **New Table Entry**. The New Award Table Entry screen appears.

5. In the **Description** field, enter an award such as "Gold Pin".

6. In the **Min amount of service** field, enter "150"the amount of time required to qualify for this award.

7. To save the new entry, click **OK**. You return to the Tables page. In the Table Entries box, the new entry appears.

Ratings Table Entries (Available with Prospect Research Management)

If you have the optional module *Prospect Research Management*, ratings tables are available. Ratings table entries are used in conjunction with outside ratings companies for prospect research. This table differs from a standard table in that you can define the data type for the new entry. For example, you might create a table based on how much a prospect is likely to give, and choose a data type of currency to create entries for the table.

▶ **Add a new Ratings table entry**

To track information for your organization's prospective donors, you can add entries in the **Ratings** table.

> *Scenario:* You need to create a new **Ratings** table entry for your prospects for the year 2005. To help define prospects, you want to create a new table to work in conjunction with the new entry.

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

2. Click **Tables**. The Tables page appears.

3. In the Tables box on the left, select **Ratings**.

4. On the action bar, select **New Table Entry**. The New Ratings Entry screen appears.

5. In the **Description** field, enter "Prospect for 2005"the name of your new rating entry.

6. SelectIn the **Data Type** field, select "Table". If you select a data type of "Table," tThe **Table name** field is enabled.

7. In the **Table Name** field, select "[Add New table]." The Add New Table screen appears.

8. In the **Name** field, enter "Ratings for 2005" as the name of the new table.

   You can define entries such as "Good Prospect" and "Potential Major Donor" for this new table.

9. To save the new table, click **OK**. You return to the New Ratings entry screen.

10. To save the new entry, click **OK**. You return to the Tables page. In the Table Entries box, the new entry appears.

# Eliminate Duplicate Table Entries

Maintaining consistency in your table entries enables you to get the most accuracy in your queries and reports. However, even if you take great care when you create table entries, you can occasionally wind up with multiple entries that represent the same thing. For example, you may have **Action** table entries of "Phone Call" and "Telephone Call." A query based on "Phone Call" would not show the action entries of "Telephone Call" and therefore might not show all the records you would like included.

The Table Cleanup utility allows you to replace duplicate table entries. You select the entry to be replaced and the entry to replace it with. In the previous example, you may decide to replace "Phone call" with "Telephone Call" in all records on which it appears. Additionally, you can specify that the entry you replace be deleted from *Configuration*, so it cannot be added to any new or edited records.

▶ **Clean up table entries**

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

2. Click **Tables**. The Tables page appears.

3. Select the table on the left that contains entries to clean up. In the action bar, click **Table Cleanup**. The Table Cleanup screen appears.
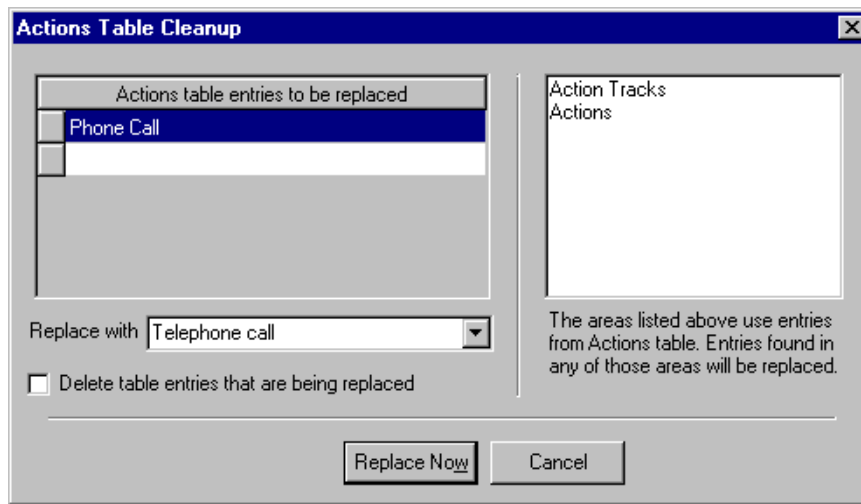
The box on the right displays the areas of the program that use entries in the selected table.

4. In the **Table entries to be replaced** grid, select the table entry to replace. This entry will be replaced on all records on which it currently appears.

Note: If you enter a new table entry in the **Replace with** field, a message appears to ask whether to add the new entry for the selected table.

5. In the **Replace with** field, select the entry to use to replace the entry selected to be replaced.

6. To delete the replaced entry from *Configuration* so users cannot add it to any new or edited records, mark **Delete table entries that are being replaced**.

Note: You cannot select the same entry in the **To be replaced** grid and the **Replace with** field. If you do, when you click **Replace Now**, a message appears to inform you that you must change an entry.

7. To change the table entries according to your selections, click **Replace Now**. You return to the Tables page. If you mark **Delete table entries that are being replaced**, the entries you replaced no longer appear on the Tables page or on dropdowns or table lookups on records.

Manage Tables

You can edit table entries, insert new ones into selected spots in the grid, delete entries, delete user defined tables, print lists of entries, quickly find entries in the grid, sort and move entries, and view table descriptions.

Managing tables includes the following procedures:

- "Edit a table entry" on page 21
- "Insert a new table entry" on page 21
- "Delete a table entry" on page 22
- "Delete a user defined table" on page 23
- "Print a list of table entries" on page 23
- "Find a table entry" on page 24
- "Sort and move table entries" on page 25
- "View table descriptions" on page 26

▶ **Edit a table entry**

You can open an existing table entry and make changes to it. When you change a standard table entry, all records with the old entry update automatically to include the new entry. However, when you change an entry on a non-standard table such as **Benefits**, the change does not affect records that already contain the entry. Any changes you make appear only on records to which you add the entry after editing.

Scenario: Your organization created a **Committees** table as a constituent attribute. The table has an entry titled Strategic Planning. You need to change the name of the committee to Long Term Planning.

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

2. Click **Tables**. The Tables page appears.
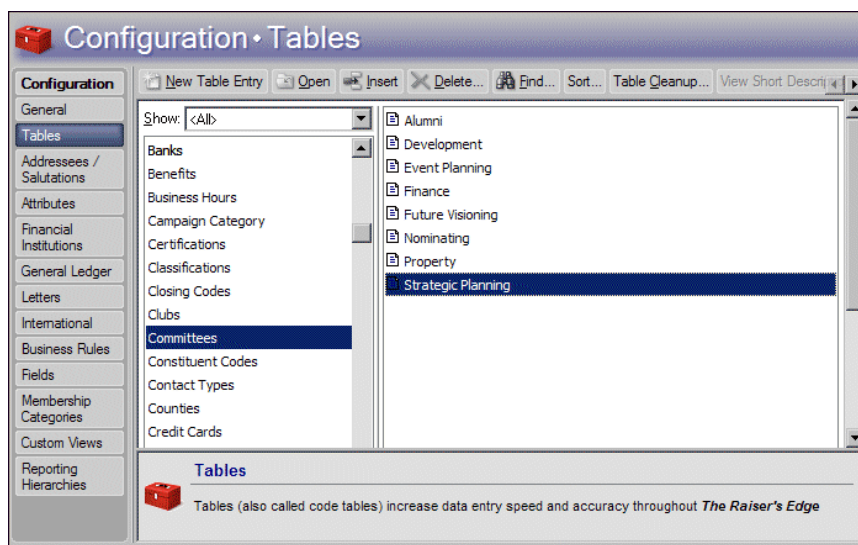
3. In the Tables box, select the **Committees** table with the entry to edit.

4. In the Table Entries box, select "Strategic Planning"the entry to edit.

5. On the action bar, click **Open**. The Edit Table Entry screen appears.
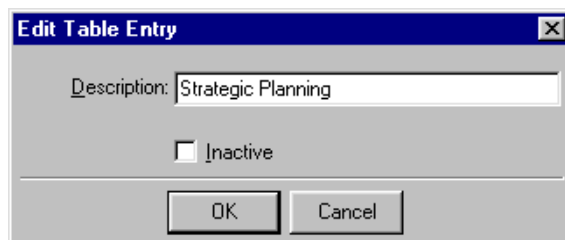
6. Change the description to "Long Term Planning".

7. Click **OK**. You return to the Tables page. The changes are automatically saved and you can now place the new entry on a record. The new "Long Term Planning" entry replaces the old "Strategic Planning" entry on all records.

▶ **Insert a new table entry**

Note: A table entry created with **New Table Entry** appears at the bottom of the list of entries. You can use **Insert** to create an entry and automatically place it in a selected spot on the list.

You can add an entry to a table. Your entry will always appear above the entry you select.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.
2. Click **Tables**. The Tables page appears.
3. In the Tables box, select the table into which to insert a new entry.
4. In the Table Entries box, select the entry above which to insert a new entry.
5. On the action bar, click **Insert**. The New Table Entry screen appears.

6. Enter a description. For some table entries, you define only a long description; for others, you must define both a long and short description. For tables with both, you can display either description (see "View table descriptions" on page 26).

Note: Even though you cannot delete table entries that are in use, you can make it inactive and mark **Display active entries only** on the Tables page to ensure users do not use an entry again.

To make the entry unavailable for use, mark **Inactive**. It does not appear when table entries are viewed from another area of the program. If you mark **Display active entries only** on the Tables page, the table entry does not appear in the Table Entries box.

7. To save the new entry, click **OK**. You return to the Tables page. In the Table Entries box, the new entry now appears.

▶ **Delete a table entry**

You can delete a table entry from the grid on the Tables page in *Configuration*; however, you can only delete entries that are not in use anywhere in the program.

> ***Scenario:*** You want to clean up your **Constituent Code** table by deleting codes you no longer use. You decide to eliminate the Friend entry. The entry is currently in use on several records.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.
2. Click **Tables**. The Tables page appears.
3. In the Tables box, select **Constituent Code**the table with the entry to delete.
4. In the Table Entries box, select "Friend"the entry to delete.
5. On the action bar, click **Delete**. A confirmation message appears.
6. To delete the entry, click **Yes**.

If the entry is in use anywhere in the program, you cannot delete the entry. When you attempt to delete Friend from the **Constituent Code** table, a message appears. Click **OK**.

7. You return to the Tables page. You must remove the entry from all records before you can delete it. As an alternative, we recommend you make the entry inactive so users cannot add it to any further records.

▶ **Delete a user defined table**

> **Note**: You can delete only tables you create. To delete them, use the right-click menu or select **File**, **Delete** from the menu bar. **Delete** on the action bar is enabled only for table entries.

You can delete only tables you defined, such as **Donor Category** or **Attribute** tables. You cannot delete a table if any of its entries are in use on a record. Before you can delete a table, you must delete all its entries even if none of them are currently in use on a record. To delete a table from the right-click menu, select **Delete Code Table**.

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

2. Click **Tables**. The Tables page appears.

3. In the Tables box, select a table you created.

4. With the cursor anywhere in the Tables box, right-click your mouse. A shortcut menu appears. If you defined no entries, or deleted all entries for a table, **Delete Code Table** is enabled in the shortcut menu.

5. Select **Delete Code Table**. A verification message appears.

6. To delete the table, click **Yes**. You return to the Tables page.

▶ **Print a list of table entries**

You can print a list of all your table entries to keep in your files or to use to create a procedures manual for your organization.

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

2. Click **Tables**. The Tables page appears.

3. In the Table Entries box, right-click, and select **Print**, **Code Tables Report**. The Code Table Report screen appears.
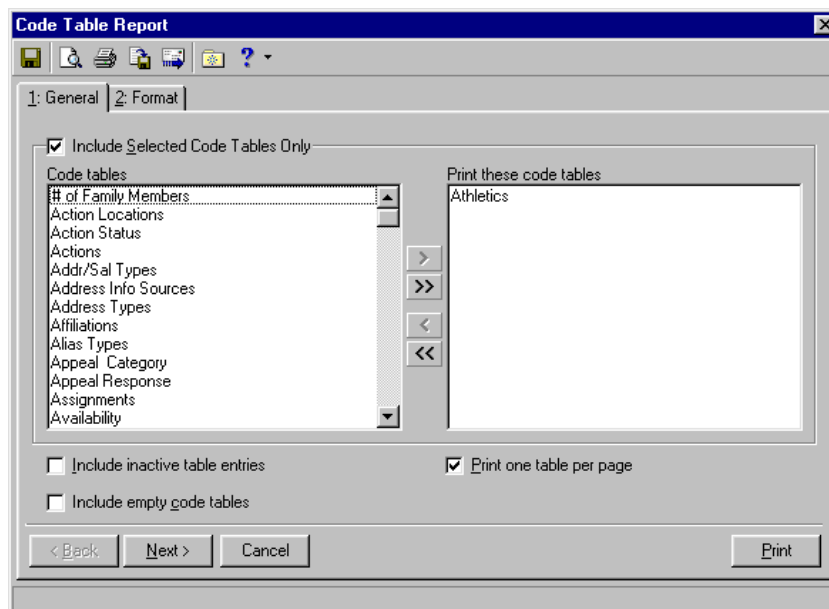
4. Select the General tab.

5. To not include all tables in the report:

   a. Mark **Include selected code tables only**.

   b. To move the tables to print from the **Code tables** box to the **Print these code tables** box, use the arrows or double-click the table.

6. To print entries you made inactive, mark **Include inactive table entries**.

7. To print the names of tables for which you have defined no entries, mark **Include empty code tables**.

8. To print each table on a separate page, mark **Print one table per page**.

9. Select the Format tab.
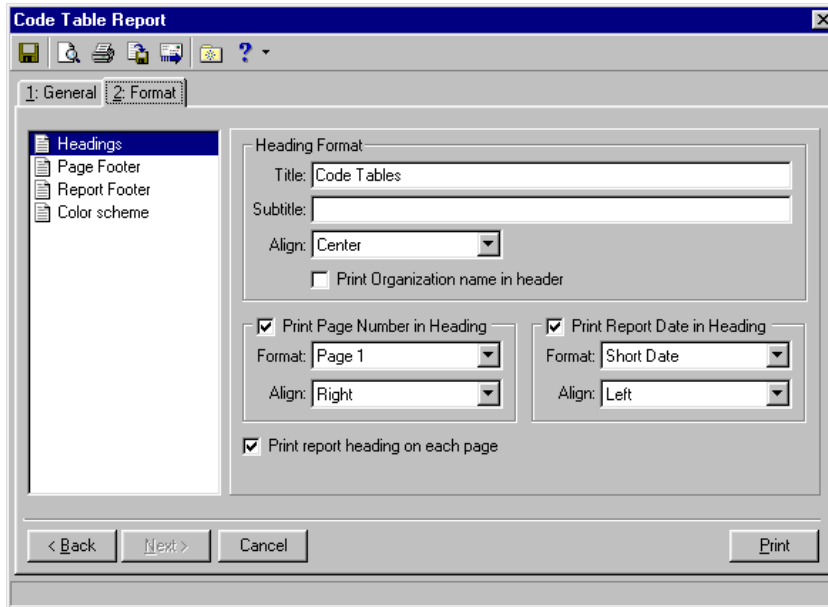
The Format tab contains a wide variety of settings you can use to customize the report. For more information about the Format tab, see the individual report guides.

10. To print the report, click **Print**.

▶ **Find a table entry**

On the Tables page in *Configuration*, you can find any existing table entry in the program. You can search for entire entries or certain words or parts of entries. You can use this for tables that contain so many entries all are not visible on the screen at the same time.

> *Scenario:* You created a number of entries for the **Constituent Code** table. All entries are not visible in the Table Entries box at the same time. You need to find an entry for Current Parent in your table. Use this method as an alternative to scrolling through all the entries.

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

2. Click **Tables**. The Tables page appears.

3. In the Tables box, select athe **Constituent Code** table.

Note: **Find** in the action bar always searches for table entries. However, if you right-click in the Tables box, you can use **Find** in the shortcut menu to find a table.

4. On the action bar, click **Find**. The Find screen appears. The **Field** field displays Long description or Short description, based on the current view you use on the Tables page.

5. In the **Find what** field, enter the entry name or part of the name. To search for the constituent code Current Parent, enter "c".

6. In the **Match** field, select whether you want your entry in the **Find what** field to match any part of field, the whole field, or the start of field. In this case, select "Start of field".

7. To find the first match that meets your search criteria, click **Find First**. The first entry that begins with c (in the order the entries are listed, not alphabetically) is selected in the Table Entries box.

8. When you click **Find Next**, any subsequent entries that begin with c highlight in the Table Entries box.

‣ **Sort and move table entries**

Tip: To speed your data entry for tables with large numbers of entries, sort the entries alphabetically. This makes individual entries easier to locate. Or, use the up and down arrows to place the most frequently used entries at the top of the list to save time when you scroll through it.

You can set the order in which table entries appear in the drop-down list. For tables with numerous entries, you may want to sort the order alphabetically so you can quickly find particular entries. For tables with easily recognizable short descriptions, you can sort by those descriptions. You cannot sort tables with entries defined by the program such as **State**. If you try to sort one of these tables, a message appears to state "A table with system-defined entries cannot be sorted."

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

2. Click **Tables**. The Tables page appears.

3. In the Tables box, select the table to sort.

Note: When you use **New Table Entry** to add new entries to a table, they appear at the bottom of the list even if you already sorted the table entries. To include the new entry in a sort order, you must sort the table again.

4. On the action bar, click **Sort**. The Sort Table Options screen appears.
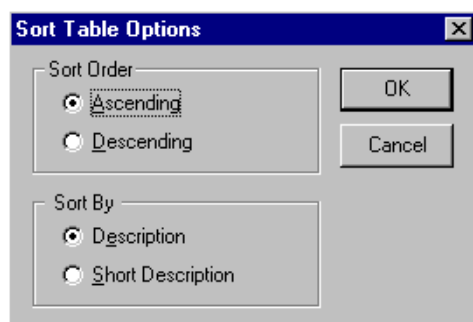
5. Under **Sort Order**, select the order in which to sort the entries.

   • To sort the table entries in alphabetical order from A-Z, select **Ascending**.

- To sort the table entries in reverse order from Z-A, select **Descending**.

6. Under **Sort By**, select whether to sort the entries by their long or short descriptions.

7. To save your settings, click **OK**. You return to the Tables page.

8. To move a selected entry up or down one line in the list, use **Up** and **Down** on the action bar. To save time when you scroll through entries, you can place the most frequently used ones at the top of the list.

▸ **View table descriptions**

> **Note**: The view you select here does not affect how these entries appear in data entry (by long or short description). You can select how the entries display on records on the General tab of User Options.

This option is enabled only for tables that contain entries with both a long and short description. You can select whether long and short descriptions of table entries appear in the list. You may want to view long descriptions first to learn your table entries. Then, once you become familiar with the long descriptions, you can view short descriptions to save time.

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

2. Click **Tables**. The Tables page appears.

3. In the Tables box, select a table with both a long and short description, such as **Constituent Codes**.

4. On the action bar, click either **View Long descriptions** or **View Short Descriptions**. The buttons are enabled only when you select a table that has both long and short entries. The available command depends on which view you use.

Table Descriptions

The following pages contain a list of tables in *The Raiser's Edge* along with descriptions and examples of each. The examples column is not meant to be a definitive list. You can use these table descriptions to help set up your tables. When you create an attribute with a data type of table, you add tables not listed on the following pages. Additionally, when you make a field a "lookup" it appears in the list of tables in *Configuration*. For more information about making fields lookups, see the Fields section of the Configuration chapter of this book.

An asterisk (*) indicates that a table is available with an optional module.

Table Name	Location	Description	Examples
Action Location	Action record, General tab	Describes where an action such as a lunch meeting will take place.	Any location in which an action can take place. For example, Chamber of Commerce, Board Room, hotel, and restaurant.
Action Status	Action record, General tab	Describes the state of progress for an action.	Open, Closed, Pending, and Continuous. The Tickler Report (one of several Action Reports) can be processed based on an action's status. The Tickler Report can only be processed for Open actions (for example, a list of pending tasks).

Table Name	Location	Description	Examples
Action	Action record, General tab	Describes any action taken toward a constituent on a specific date. Also used to track the entire cultivation and solicitation process.	Lunch Meeting, Dinner Meeting, Follow-Up Call, Sent Black Tie Invite, Accepted Black Tie Invite, Declined Black Tie Invite, Attended Black Tie Dinner.
Addr/Sal Types	Constituent record, Addressees/Salutations tab	Defines the purpose of a particular addressee or salutation.	You can define Addr/Sal Types for reporting and for different mailings. Examples may include: Alumni Mailing, Informal Salutation, Informal Addressee, Spouse Salutation, and Invitation Mailing.
Address Info Sources	On screens containing address information	Identifies the origin of the address information.	Post Office, Mailing House, Survey, Membership Form, and Telephone Book.
Address Types	On screens containing address information	Identifies the purpose or type of address for information purposes.	Home, Vacation Home, Winter Home, Business, and Rental Property Address.
Affiliations	This table is not currently used anywhere in the program. It contains values for the Affiliations tables from *The Raiser's Edge* 6.x if those values were converted. You can use information as an attribute table in version 7.	Defines a constituent's association with a business, club, or other organization. You can identify constituents' involvement in local professional associations, service on the board of another nonprofit, or the church in which they are a member	Charitable Society, Financial Institution, Healthcare Organization, Religious Organization, and School.
Alias Types	Aliases screen (via the Alias button on screens where name information can be entered)	Defines another name which an individual or organization might use, such as an acronym for an organization.	Stage Name for an individual and Annual Report Name for an organization.

Table Name	Location	Description	Examples
Appeal Category	Appeal record, General tab	Groups appeals together. For example, you may have several different appeals aimed at major donors.	Continuous, Direct Mail, Major Donor, and Prospect.
Appeal Response	Constituent Record, Appeals tab	Indicates how a constituent responded when contacted during an appeal.	Received, Requests removal from mailings, Interested at a later date, and Attended.
Assignment Interests*	Constituent record, Volunteer tab; Job record, Details tab	Identifies areas in which volunteers are interested in working.	Information Desk, Newsletter Staff, Photography, Seniors, Soup Kitchen, Phonathon, and Gift Shop.
Awards*	Constituent record, Volunteer tab	Tracks past awards and hours toward the next award level.	500 hrs. Gold Pin, 200 hrs. Silver Pin, and 100 hrs. Bronze Pin.
Banks	Configuration, Financial Institutions link; Constituent records, Relationships tab	These entries define banks with which you conduct business such as eft or other transactions. Do not confuse these institutions with banks you may enter into your database as constituents.	Any financial institution. For example, Lexington State Bank, Federal Credit Union, and Bank of the Nation. After you add the institution, you can add individual branches within the bank.
Benefits	Configuration, Membership Categories; Constituent record, Memberships tab; Membership record, Memberships tab; Appeal record, General tab; Packages, General tab; Event Participant record, Registration Fees/Donations tab	Tracks different premiums received by constituents based on their membership level(s) or giving response to appeals.	10% Discount, Free admission, Newsletter, Coffee mug, T-shirt, and Calendar.

Table Name	Location	Description	Examples
Campaign Category	Campaign record, General tab	Groups campaigns together. For example, you may have a number of different campaigns in the "Operating" category.	Annual, Capital, Operating, and Event.
Campaign Goal	This table is not currently used anywhere in *The Raiser's Edge.* You can associate it with an attribute if you want to establish certain goals for your campaigns.	Defines levels of success you hope to reach with a campaign.	Exceed last year by 10%, Exceed last year by 20%, and Exceed last year by 50%.
Certifications*	Constituent record, Volunteer tab; Job record, Details tab	Tracks any certification volunteers have received qualifying them for a job. For example, if volunteering to teach CPR classes, the volunteer would need to be CPR certified.	Real Estate License, Certified Public Accountant, and Certified Lifeguard.
Classifications*	Constituent record, Prospect tab	Identifies and classifies prospects.	Individual, Corporate, Organization, and Major Donor.
Constituent Codes	Constituent record, Bio 2 tab or Org 2 tab; Gift record, Miscellaneous tab	Constituent codes define the relationship(s) or connection a constituent has to your organization. Every constituent should have at least one constituent code to explain why he is in your database. Constituent codes classify groups of constituents for analysis throughout the program in queries, reports, and other functions.	Board Member, Alumni, Current Parent, Student, Volunteer, Staff, Employee, Corporation, Foundation, and Matching Gift Company.

Table Name	Location	Description	Examples
Contact Types	Constituent record, Relationships tab (organizations only).	Defines the purpose of the contact relationship for an organization.	Primary, Social, Mailing, Corporate Donations, and Volunteer Coordinator.
Counties	On screens containing address information	Defines counties in which constituents live, financial institutions are located, etc.	Charleston, Orange, Berkeley, and Dorchester Counties.
Credit Cards	Constituent record, Bio 2 tab; Gift record, Miscellaneous tab	Stores information about a donation made by credit card.	American Express, Visa, and MasterCard.
Currency Types	Accessed through Configuration, International link	Tracks the associated currency for different countries. Your native currency symbol is established in the Windows Control Panel.	Dollars, Pounds, Drachma, and Yen.
Degrees*	Education record, School tab (via Constituent record, Bio 1 tab, Education button)	Tracks a constituent's level of education.	Bachelor of Arts, Bachelor of Science, Masters, and Ph.D.
Departments*	Constituent record, Volunteer tab; Job record, Volunteers tab	Identifies the office or department where a volunteer is assigned to work.	Business, Education, Public Safety, Community Service, and Maintenance.
Divisions*	Sport Information screen (via Participant record General 1 tab, More Info button)	Part of a participant's assignment information, for a sporting event. Divisions can be used as to group participants or teams of participants in an event.	Majors Division, Minors Division, Employees Division, and Corporate Division.

Table Name	Location	Description	Examples
Donor Age Analysis Codes	This table is used for Demographic and Statistical Reports	Donor Age Analysis Codes use the Birth date field on the Bio 1tab of the constituent record to calculate age groups. The Statistical Report by Age Group uses this information to analyze giving by age.	Donor Age codes should be entered in ascending order. Enter an age and when reports are processed, the program establishes ranges between each age entered. For example, if you have two entries, 50 and 60, the report calculates the age range 50-60.
Donor Categories – Table 1	This table is used for the Donor Category Report	Donor Categories identify "cumulative" giving clubs with a required amount of giving. Categories are established (in the table) in descending order. The Donor Category Report is an Analytical Report. If you have the optional module *Membership Management*, be sure you do not confuse Donor Categories with Membership Categories.	Gold Club with a required amount of $10,000, Silver Club with a required amount of $5,000, and Bronze Club with a required amount of $1,000.
Donor Categories – Table 2	This table is used for the Donor Category Report	This is an additional table to use if you need to measure cumulative giving in more than one predetermined set of giving ranges. You can set up your giving levels in any one of three tables. The Donor Category Report is an Analytical Report. If you only need to measure one set of giving levels, you only need to use one table.	Diamond Club with a required amount of $10,000, a Ruby Club with a required amount of $5,000, and an Emerald Club with a required amount of $1,000.

Table Name	Location	Description	Examples
Donor Categories – Table 3	This table is used for the Donor Category Report	This is an additional table to use if you need to measure cumulative giving in more than one predetermined set of giving ranges. You can set up your giving levels in any one of these three tables. If you only need to measure one set of giving levels, you only need to use one table.	Sustainer with a required amount of $10,000, Benefactor with a required amount of $5,000, and Sponsor with a required amount of 1,000.
Education Status*	Constituent record, Bio 1 tab, Education button	Describes the current status of a constituent's higher education.	Graduated, Registered, Dismissed, Probation, Internship Program, Current Student, and Transferred Out.
Ethnicity	Constituent record, Bio 2 tab	Classifies constituents by their ethnicity.	African American, Hispanic, Asian, and Caucasian.
Event Awards*	Participant record (accessed through the event or constituent record), More Info button	Awards presented to participants at an event.	Golfing pass, Golf Clubs, Gift Certificate, and Volunteer Award.
Event Expenses*	Event record, Expenses tab	Any expenses incurred from holding a special event.	Table Rental, Catering, Room Rental, Green Fees, Photography, Printing, Supplies, and Postage.
Event Groups*	Event record, General tab	Used to group events of a similar type together. For example, you may hold several Dinner events each year.	Summer Series of Fun, Dinner, Alumni, Auction, and Yearly Gala Balls.
Event Menu Items*	Dinner event record, From menu bar, select Event, Menu	Any food items you serve at a dinner event.	Caesar Salad, Potato Salad, Vegetables, Beef Wellington, and Trout Almondine.

Table Name	Location	Description	Examples
Event Notepad Types*	Event record, Notes tab	You can create different categories for event notes. Security settings can be based on different types of notepads.	Alternate Location Information, Prospect Notes, Location Notes, Participant Notes, and Agenda.
Event Types*	Event record, General tab	Describes the type of event being held.	Golf Tournament, Grand Opening, Seminar, Yearly Gala Ball, and Volunteer Appreciation.
Event Units*	Event record, Prices tab; Participant record, Registration Fees/Donations tab; Constituent Record, Events tab, Registrant Fees/Donations tab	Describes what the participant purchased for the event. The units you use will vary according to the type of event you are holding.	Individual, Foursome, Hole in One Sponsor, Corporate Sponsor, Couple, Family, Group, Adult, and Child.
Expense Types	Appeal record, Attributes/Expenses tab	Any expenses incurred from fundraising through a specific appeal.	Catering, Printing, Postage, Phone Charges, and Mailing List.
Financial Data Types*	Constituent record, Prospect tab, Financial button	Tracks prospects' assets.	Real Estate, Stock Holdings, and Net Worth.
Fund Categories	Fund record, General tab	Categories group funds together. For example, an Equipment Fund, Computer Fund, and a Library Fund can all be considered a part of the General Operating Fund Category. Queries can be created based on Fund Category information.	Annual, Capital, Scholarship, Endowment, Restricted, Unrestricted, and Membership.

Table Name	Location	Description	Examples
Fund Goal	This table is not currently used anywhere in *The Raiser's Edge.* You can associate it with an attribute if you want to establish certain goals for your campaigns.	Defines levels of success you hope to reach with a fund.	Exceed last year by 10%, Exceed last year by 20%, and Exceed last year by 50%.
Gift Codes	Gift record, Miscellaneous tab	Used to track gift characteristics. For example, if your organization recognizes certain constituents for their gifts by placing their names on a plaque, you can add a gift code of "Donor Wall" to gifts that meet the requirements. Because you are tracking whether a constituent should be included on the donor wall, you can use this information to create a query or a mailing for individuals who qualify for the donor wall.	Donor Wall, Hall of Fame, and Special Honors.
Gift Size Analysis Codes	This table is used for reporting purposes.	Allows you to run Statistical Reports by Gift Size. These reports analyze the number of gifts within your gift amount ranges. Gift amounts are entered in descending order.	If the table has a gift amount of $0 and another for $99, the Statistical Report by Gift Size automatically reports on these amounts as a range (i.e., 0-99). You received x amount of gifts from x amount of donors totaling x amount of dollars. This report determines the mean gift size constituents donate and other statistics.

Table Name	Location	Description	Examples
Gift Notepad Types	Gift record, Miscellaneous tab	You can create different categories for gift notes. Security settings can be based on different types of notepads.	Planned Giving, Large Donation, Solicitation Information, and Property.
Gift Subtypes	Gift record, Gift tab; Fund record, GL Distributions tab	Establish gift subtypes to further define your gift entry. For example, if your organization receives frequent donations of computers, you can select Gift-in-Kind in the Gift type field and enter a Gift subtype of Computers.	Annuity, Bequest, Charitable Lead Trust, and Acreage.
Income	For an individual: Constituent record, Bio 1 tab, Business button; for an organization: Constituent record, Bio 2 tab	Indicates an individual's or an organization's net worth. Income Level on the business screen of an individual's record tracks the salary level for that constituent. This table should be set up in ranges of amounts in descending order. The Statistical Report by Income Range uses this information.	Income ranges include $15,000-$19,999, $20,000-$24,999, and $25,000-$29,999. These ranges can be based on any increment your organization tracks.
Industries	For an individual: Constituent record, Bio 1 tab, Business button; for an organization: Constituent record, Bio 2 tab	Industry tracks the type of business.	Transportation, Computers, Healthcare, Construction, Finance, Legal, Research, and Insurance.
Information Sources*	Prospect record (via Constituent record, Prospect tab, Financial button)	Tracks the source used to gather information about your prospect's financial/asset information.	Tax Assessor, Prospect Research Firm, SEC, and S&P.

Table Name	Location	Description	Examples
Instruments*	Prospect record (via Constituent record, Prospect tab, Proposal button)	Further defines the Type of Gift (e.g., for a Planned gift when preparing proposals).	DGA, IGA, CRAT, CRUT, NIMCRUT, and PIF.
Job Category*	Job record, General tab	Links similar jobs under the same umbrella. For example you may have several different jobs that are all for events.	Coordinator, Event, Office Staff, Maintenance Staff, and Instructors
Job Task*	Job Assignment screen (via Job record, Volunteers tab; Constituent record, Volunteer tab)	Defines the type of task called for in a specific job	Counseling, Data Entry, Facilitate Class, and Meal Server
Locations*	Job Assignment screen (via Job record, Volunteers tab; Constituent record, Volunteer tab)	The name or specific address of a location where a job will take place.	Emergency Service Department, Mission and Shelter,
Lodgings*	Participant record, General 2 tab	Lodgings are part of a participant's assignment information, which identifies special table, seating, lodging, or team assignments for a participant in a special event.	Name of the hotel or other facility to which the participant is assigned. For example, Dorms, Campsite, Cabins, and Off Campus.
Mail Types	On screens containing address information	Identifies the type of mail the constituent receives at the associated address. You can choose to send All Mail Types, Selected Mail Types, or No Mail for each address.	Newsletter, Acknowledgment Letter, Receipt, Reminder, Solicitation Letters, and Birthday or Christmas Cards.
Major/Minor*	Education record, School tab (via Constituent record, Bio 1 tab, Education button)	Identifies constituent's area of study.	Accounting, Biology, Business, Chemistry, English Literature, and Theology.

Table Name	Location	Description	Examples
Marital Status	Constituent record, Bio 1 tab	Defines a constituent's current marital status.	Married, Widowed, Divorced, Single, Separated, Partner, and Significant Other.
Media Type	Constituent record, Media tab; Event record, Media tab; Proposal record, Media tab	Identifies the type of media record you are viewing or adding.	Video, Picture, Clipping, Document, and Map.
Membership Card Types*	Membership record, Card Information screen (via Membership tab, Members & Cards button)	Identifies the type of membership card available with a membership.	Joint, Child, Corporate, Guest, and Temporary.
Membership Categories*	Membership record, Membership tab (Membership Categories are established in Configuration)	A membership category defines the level of giving required for a constituent to gain membership in one of your categories or clubs. You can define membership categories based on program titles, minimum and maximum dues amounts, and number of members.	Lifetime, Student, Patron, Senior, Corporate, Sustainer, Benefactor, Individual, and Family.
Membership Programs*	Membership record, Membership tab (Programs are established in the Membership Categories link of Configuration)	Programs are used to group membership categories under the same umbrella. For example, you may have an Education Program that includes the Sustainer, Individual, and Family categories.	Education, Individual, Business Level, and Friends of the Museum.

Table Name	Location	Description	Examples
Membership Subcategories*	Membership record, Membership tab (Subcategories are established in the Membership Categories link of Configuration)	You can use subcategories to further define membership categories. For example, you may have a Student category, with subcategories of High School and College.	High School, College, Preservation Society, and International.
Notepad Types	Constituent, Event, and Gift records, Notes tab	Defines the information stored on the Notepad record. These types can be used to limit security access.	Director's Notes, Solicitor's Notes, Career Notes, Confidential Notes, and Family Notes.
NZ Cities	Biographical	Used when importing or otherwise manipulating addresses located in New Zealand.	Any city in New Zealand.
NZ Suburbs	Biographical	Used when importing or otherwise manipulating addresses located in New Zealand.	Any suburb in New Zealand.
Organization Type*	Constituent record, Prospect tab	Indicates the type of organization to which a prospect has given in the past.	Medical, Education, Environmental, and Youth Development.
Package Category	Appeal record, Packages Tab	Package categories are a way to group similar packages together. For example, you can group packages for booklets, brochures, newsletters, and postcards under the Mailing category.	Newspaper, Website, Radio, and Newsletter.
Participant Status*	Event record, Participants tab	Track a special event participant's status.	Paid, Not Paid, and Complimentary.
Participation*	Event record, Participants tab	Indicates a special event participant's level.	Captain, Individual, Team Member, and Couple.

Table Name	Location	Description	Examples
Phone Types	Individuals: Constituent record Bio 1 tab (Home, Alternate, and Business Address); Organizations: Constituent record Org 1, and Contacts tabs	Classifies the phone number by type. Since every address can have multiple telephone numbers, the type lets you classify each. Telephone numbers should be entered in descending order of importance.	Home, Car, Beeper, Home Fax, Summer Home, Winter Home, Business, Business Fax, Main Office, and E-mail.
Professions	Relationship General 1 tab. (individuals via Constituent record, Relationships tab or Bio 1 tab, Business button; organizations via Constituent record, Contacts tab)	Identifies a relationship's profession or general area of employment.	Administration, Banking, Computers, Government, Medicine, Law, and Engineering.
Proposal Reasons*	Proposal record, General tab (via Constituent record, Prospect tab, Proposal button in action bar)	Indicates the reason a proposal is being made to the constituent. For example, she may have recently received a salary bonus or increase.	General, Inheritance, Salary Bonus, and Sale of Business.
Proposal Status*	Proposal record, General tab (via Constituent record, Prospect tab, Proposal button in action bar)	Indicates the standing of a proposal.	Initial Contact, Pending, Accepted, and Rejected.
Prospect Interests*	Constituent record, Prospect tab	Identifies areas or specific programs to which a prospect is interested in giving.	Cancer Research, AIDS Research, Children's Programs, and Athletic Programs.
Prospect Status*	Constituent record, Prospect tab	Indicates the standing of a prospect.	Accepted, Active, Cultivation, Pending, Rejected, and Solicited
Purposes*	Proposal record, General tab (via Constituent record, Prospect tab, Proposal button in action bar)	Identifies the intended use of a proposed donation once received.	West Wing Cancer Center, Research Current, Research Endowment, and Discretionary.

Table Name	Location	Description	Examples
Ratings*	Constituent record, Prospect tab	Prospect ratings are obtained from research firms. Prospect ratings can vary depending on your source of information.	Excellent Prospect, Hesitant, Needs Cultivation, Very Good, and Excellent.
Reason *	Drop Membership screen (via Constituent record, Membership tab, Drop button on the action bar)	Tracks why a membership was dropped.	Moved, Program Ended, Failed to Complete Payment Schedule, Member Request, and Check Returned.
Regions	On screens containing address information	Identifies the geographic location of the address.	Pacific Northwest, Northeast, Southeast, MidWest, and Europe.
Registration Response*	Event record, Participant (registrant) record, General 1 tab	Indicates how a registrant responded to an event invitation.	Accepted, Declined, Requested More Information, and Tentative.
Relationship	Constituent record, Relationships tab	Relationships describe the associations a constituent has with other individuals or groups.	Mother, Daughter, Father, Sister, Brother, Friend, Attorney, Executor, Golfing Partner, and Business Partner.
Religions	Individual Constituent record, Bio 2 tab	Identifies a constituent's religious affiliation or preference.	Baptist, Catholic, Jewish, Lutheran, and Muslim.
School Types	Individual Constituent record, Bio 1 tab, Education button	Classifies educational institutions.	Community College, Technical College, Junior College, University, Law School, and Medical School.
Schools	Individual Constituent record, Bio 1 tab, Spouse tab, Education button	Defines the specific name of an educational institution.	The Citadel, Duke University, Yale, Harvard, and University of Washington.
Solicit Code	Constituent record, Bio 1 or Org 1 tab	Indicates whether or how often a constituent can be solicited.	One solicitation annually, Do not solicit, Do not phone, Do not mail, Removed by request, and No mail temporarily.

Table Name	Location	Description	Examples
Solicitor Goal Categories	Solicitor Information screen, Goals tab (via Constituent record, Bio 1 tab, Details button)	These categories group unspecified goals (those not associated with a campaign or fund). For example, you may have a category called Flowers, for the purpose of covering the expense of flowers or plants your organization purchases as condolence or congratulatory gifts for constituents.	Food Costs, Flowers, and Mailing Fees.
Solicitor Type	Solicitor Information screen, Assignments tab (via Constituent record, Bio 1 tab, Details button)	Specifies the sort of solicitor for a specific assignment.	Annual, Campaign, Event, Fund, Membership, Staff, and Volunteer.
Sources	Constituent record, Prospect tab.	Identifies the organization that provided a prospect rating.	Forbes, General Research, Marts & Lundy, The Whelan Group, and Econometrics
Special Interests	This table is not currently used anywhere in *The Raiser's Edge.* You can associate it with an attribute if you want to track interests for your constituents.	You can use this table to track areas of interest for your constituents. For example, you could target invitations to golf tournament event to constituents with the special interest of "Golf."	Boating, Photography, Reading, and Soccer.

Table Name	Location	Description	Examples
Sporting Event Location	Sport Information screen (via Participant record General 1 tab, More Info button)	Indicates the location of a particular participant for a sporting event. For example, your golf tournament may be held at a country club with more than one course. You can select which course a participant is scheduled to play on here.	Sea Gull Course, Osprey Course, Track A, and Track B.
Sporting Event Position	Sport Information screen (via Participant record General 1 tab, More Info button)	Indicates the position a participant is assigned for a sporting event.	Captain, Pitcher, Second base, and Goalie.
States	On screens containing address information	Indicates state in an address	All states
Suffixes (This table is established when the program is installed. You can change or add to this table when the need arises.)	For individuals: Constituent record, Bio 1, Spouse, and Relation tabs. For organizations: Constituent record, Contacts tab	A suffix is an addition to the constituent's name. It appears after the last name.	Jr., Sr., II, and MD. Any punctuation that should print before the suffix should also appear in the table.
Targets	Constituent record, Bio 2 tab	Indicates the amount you hope will be donated per year. This table establishes ranges for amounts in descending order. An Analytical Report, Actual vs. Target Report, compares the targeted amount with the actual amount donated.	$10,000-$14,999, $15,000-$19,999, and $20,000-$24,999. These ranges can be based on any increment your organization tracks.

Table Name	Location	Description	Examples
Teams*	Sport Information screen (via Participant record General 1 tab, More Info button)	Used to group constituents participating in an event as a team.	Teams for a golf tournament, a walk, or a run.
Titles (This table is established when the program is installed. You can change or add to this table when the need arises.)	For individuals: Constituent record, Bio 1, Spouse and Relation tabs. For organizations: Constituent record, Contacts tab	Identifies a constituent's "titles." You do not need one title for "Mr. and Mrs." Instead, place the constituent's title in the first title field and the spouse's title on the Spouse tab.	Mr., Reverend, Dr., Mrs., Judge, Father, and General.
Travel Name*	Participant record, General 2 tab	Indicates how a participant will be travelling to an event.	Delta, American, Southwest, or Amtrak.
Travel Type*	Participant record, General 2 tab	Indicates method of transportation a participant will use to travel to an event.	Airline, Train, Taxi, and Limousine.
Tribute Types*	Tribute record (via Constituent record, Honor/Memorial tab; Gift record, Tribute tab)	Indicates why a tribute gift is being given.	For the Benefit of, In Bequest of, In Honor of, In Special Recognition of, and In Support of.
Types of Gift*	Proposal record (via Constituent record, Prospect tab, Proposal button)	Identifies the form of payment the prospect will donate to fulfill a proposed donation.	Cash, Pledge, Planned Gift, Annuity, Trust, and Bequeath.
Vendor Purpose*	Participant record, Participation tab	Indicates what a participant vendor will be providing at an event.	Registration, Florist, Caterer, Awards, Parking Services, and Provide appetizers.
Vendor Rating*	Participant record, Participation tab	Indicates the merit of a vendor at an event.	Four Star, Highly Recommended, and Excellent.
Volunteer Checklist*	Constituent record, Volunteer tab; Job record, Details tab	Indicates items a volunteer must complete before she can be assigned to a job.	Complete Application, Attend Orientation, Tetanus Shot, and Health and Sanitation Class.

Table Name	Location	Description	Examples
Volunteer Checklist Letters*	Constituent record, Volunteer tab	Indicates which letter should be sent to a volunteer as thanks or acknowledgement for completing a checklist item.	Orientation Letter, Application Letter, Health Letter, and Checklist Thank-you.
Volunteer Courses*	Constituent record, Volunteer tab; Job record, Details tab	Tracks special training/courses a volunteer has completed or that are necessary to perform a job.	CPR, Historic Preservation, Water Safety, First Aid, and Job Skills Assessment.
Volunteer License Type*	Constituent record, Volunteer tab; Job record, Details tab	Identifies special licenses a volunteer possesses or that are necessary to perform a job.	Class 1A, Red Cross Certified, Driver's License, CPR Certified, and Contracting License.
Volunteer Medical Information*	Constituent record, Volunteer tab; Job record, Details tab	Indicates medical information which might qualify or disqualify a volunteer for a job.	TB Test, Tetanus Shot, Diabetes, and Heart Condition.
Volunteer Positions*	Constituent record, Volunteer tab; Job record, Volunteers tab	Indicates a job title or type of work a volunteer will be assigned to on a job	Supervisor, Runner, Food Server, and Greeter.
Volunteer Skill Levels*	Constituent record, Volunteer tab; Job record, Details tab	Tracks levels for a volunteer's skills. For example, if typing is a skill a volunteer needs, you can track the number of words/minute the volunteer can type.	Average, Above Average, Highly Skilled, Expert, and Minimal Training.
Volunteer Skills*	Constituent record, Volunteer tab; Job record, Details tab	Identifies special skills/experiences the volunteer possesses or that are required to perform a job.	Typing, Construction, Plumbing, Artistic, and Interpreter.
Volunteer Special Needs*	Constituent record, Volunteer tab; Job record, Details tab	Identifies special needs that may disqualify volunteers from performing certain jobs.	Wheelchair, Wheelchair Access, and Baby sitting Service.
Volunteer Status*	Constituent record, Volunteer tab	Identifies the volunteer's current standing.	Active, Inactive, Former, In Training, and Part time.

Table Name	Location	Description	Examples
Volunteer Types*	Constituent record, Volunteer tab; Job record, Volunteers tab	Defines the volunteer's purpose for volunteering.	Office Staff, Phonathon, Corporate, Interpreter, Medical Staff, and Office Staff.
Volunteer Vehicle Type*	Constituent record, Volunteer tab	Indicates the type of vehicle to which a volunteer has access.	Car, Truck, Four Wheel Drive, and SUV.

Addressee/Salutations

From the Addressee/Salutation page, you can view, add, edit, and delete formats for the Addressee/Salutation tab of the constituent record.

An addressee is how a constituent name appears on mailing labels, reports, and the inside address of letters. A salutation is how you greet a constituent in letters or other mailings. Standard entries are included with *The Raiser's Edge*, but you can add to or change the formats currently in the program as necessary.

You can add characters and words to the list of choices for fields in your addressees and salutations. For example, you can add **Guest** as a field so you can create addressees or salutations of "Mr. Smith and Guest" for any event that involves guests.

Want to know about "Format an Addressee/Salutation" on page 47? About "Manage Addressee/Salutations" on page 50?

▸ **Add an addressee/salutation**

You can add new addressee/salutation formats to those already in the program.

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

Note: The Addressee/Salutation examples listed are sample formats. The names used are fictitious and are meant only to provide examples of available formats.

2. Click **Addressee/Salutations**. The Addressee/Salutations page appears.
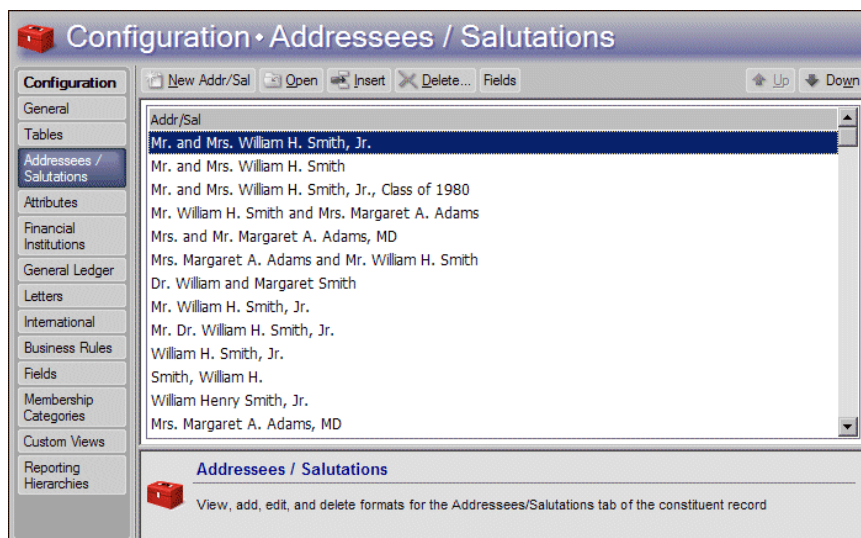
The grid lists all defined addressees and salutations in the program.

Note: An addressee/salutation created using **New Addr/Sal** appears at the bottom of the list in the Addressee/Salutations grid. You can click **Insert** to create a new addressee/salutation and place it wherever you want in the grid. You can also use the Up and Down arrows to change the order of the addressee/salutations in the grid.

3. On the action bar, click **New Addr/Sal**. The New Addressee/Salutation screen appears.

4. To view a list of the fields you can use to build a new addressee/salutation, place your cursor in the top field of the **Field Name** column and click the down arrow. An addressee of "Mr. and Mrs. William H. Smith, Jr." appears as:

You can add to and edit the selections available in this column, see "Add fields as addressee/salutation choices" on page 53.

5. When you select **Constituent Addr/Sal** as an entry in the **Field Names** column, you create an embedded addressee/salutation. With embedded addressee/salutations, you define the **Const Addr/Sal** field each time you use the addressee or salutation.

For example, you can select Constituent Addr/Sal and attach it to another field such as Position. This creates an embedded addressee/salutation.

When you select this embedded addressee/salutation on a constituent record, you can then select any other defined addressee or salutation, and the program automatically places the entry from the **Position** field of the constituent's Business record behind it. So you could have an addressee/salutation of "Mr. William Smith, President".

6. On the toolbar, click **Save and Close**. You return to the Addressee/Salutations page.

Format an Addressee/Salutation

You can apply a variety of format options to your addressees and salutations. You can mark a checkbox to activate any of these options: initial, comma, conditional break, hard break, concatenate, and smart.

- "Initial" on page 47
- "Comma" on page 48
- "Conditional Break" on page 48
- "Hard Break" on page 49
- "Concatenate" on page 49
- "Smart" on page 50

Initial

Note: Any checkbox that appears in color is locked as unmarked. If you have security rights, you can determine the color in which locked items appear on the Color tab of User Options.

When you mark this checkbox, the corresponding field is initialized. For example, to make a constituent's middle name appear as an initial followed by a period, select the **Middle Name** row, then mark the checkbox in the **Initial** column. Instead of "Mr. and Mrs. William Horace Smith", the middle name is abbreviated and appears as the initial "H" followed by a period. The **Preview** box displays an example of an addressee/salutation with your format selections.

Field Name	Initial	Comma	Cond	Hard Brk	Concat	Smart
Title 1	☐	☐	☐	☐	☐	☐
and	☐	☐	☐	☐	☐	☐
Spouse Title 1	☐	☐	☐	☐	☐	☐
First Name	☐	☐	☐	☐	☐	☐
Middle Name	☑	☐	☐	☐	☐	☐
Last Name	☐	☐	☐	☐	☐	☐
Suffix 1	☐	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐	☐

Preview: Mr. and Mrs. William H. Smith, Jr.

Want to know about the other options to "Format an Addressee/Salutation" on page 47?

Comma

When you mark this checkbox, the program inserts a comma and space before the corresponding field. For example, to place a comma between the last name and constituent code in an addressee/salutation, select the **Constituency Abbrev** row and mark **Comma**.

Field Name	Initial	Comma	Cond	Hard Brk	Concat	Smart
Title 1	☐	☐	☐	☐	☐	☐
First Name	☐	☐	☐	☐	☐	☐
Last Name	☐	☐	☐	☐	☐	☐
Constituency Abbrev	☐	☑	☐	☐	☐	☐

Preview: Mr. William Smith, AL

Want to know about the other options to "Format an Addressee/Salutation" on page 47?

Conditional Break

When you mark a checkbox in the **Cond** column, the program starts a new line of text at a specified point only if the addressee/salutation is too long to fit on a mailing label. For example, if you have a couple with different last names, the addressee/salutation may be too long to fit on one line of a label, so you can set up the addressee to read as follows:.

Mr. William Henry Smith and
Mrs. Margaret Anne Adams

The program breaks the addressee/salutation after the field with the marked checkbox. To make a line break after "and", select the **and** row and mark **Cond**. If the addressee/salutation can fit on one line, the program does not make the line break after "and".

Field Name	Initial	Comma	Cond	Hard Brk	Concat	Sma
Title 1	☐	☐	☐	☐	☐	☐
First Name	☐	☐	☐	☐	☐	☐
Middle Name	☐	☐	☐	☐	☐	☐
Last Name	☐	☐	☐	☐	☐	☐
and	☐	☐	☑	☐	☐	☐
Spouse Title 1	☐	☐	☐	☐	☐	☑
Spouse First Name	☐	☐	☐	☐	☐	☑

Preview: Mr. William Henry Smith and Mrs. Margaret Anne Adams

Want to know about the other options to "Format an Addressee/Salutation" on page 47?

Hard Break

When you mark a checkbox in the **Hard Brk** column, a new line of text always starts after the specified point. For example, if you have an addressee of "Mr. William Smith and Mrs. Margaret Adams" and mark the hard break option on the same line as **and**, the program always forces a line break after "and". Even if the entire addressee/salutation fits on one line of a label or envelope, the program breaks it into multiple lines.

Field Name	Initial	Comma	Cond	Hard Brk	Concat	Smart
Title 1	☐	☐	☐	☐	☐	☐
First Name	☐	☐	☐	☐	☐	☐
Last Name	☐	☐	☐	☐	☐	☐
and	☐	☐	☐	☑	☐	☐
Spouse Title 1	☐	☐	☐	☐	☐	☐
Spouse First Name	☐	☐	☐	☐	☐	☐
Spouse Last Name	☐	☐	☐	☐	☐	☐

Preview: Mr. William Smith and Mrs. Margaret Adams

Concatenate

When you mark a checkbox in the **Concat** column, the program removes the space after the selected field. This is especially useful for constituents with hyphenated names. For example, with an addressee of "Mrs. Margaret Adams - Smith", when you select the concatenate option for **Spouse Last Name** and **hyphen**, the space after each of these fields is removed. This results in an addressee of "Mrs. Margaret Adams-Smith").

Field Name	Initial	Comma	Cond	Hard Brk	Concat	Smart
Spouse Title 1	☐	☐	☐	☐	☐	☐
Spouse First Name	☐	☐	☐	☐	☐	☐
Spouse Last Name	☐	☐	☐	☐	☑	☐
-	☐	☐	☐	☐	☑	☐
Last Name	☐	☐	☐	☐	☐	☐
	☐	☐	☐	☐	☐	☐

Preview: Mrs. Margaret Adams-Smith

Smart

When you mark this checkbox, the program removes any field included in the addressee/salutation that does not contain an entry on the constituent record. The program also removes connecting fields such as "and". For example, if the addressee is "Mr. and Mrs. William Smith" and you select **Smart** by the **Field Name** Spouse Title 1, "and" is eliminated if no entry appears in the **Spouse** field of a constituent record to avoid an addressee of "Mr. and William Smith".

Field Name	Initial	Comma	Cond	Hard Brk	Concat	Smart	
Title 1	☐	☐	☐	☐	☐	☐	
and	☐	☐	☐	☐	☐	☐	
Spouse Title 1	☐	☐	☐	☐	☐	☑	
First Name	☐	☐	☐	☐	☐	☐	
Last Name	☐	☐	☐	☐	☐	☐	
	☐	☐	☐	☐	☐	☐	

Preview: Mr. and Mrs. William Smith

Manage Addressee/Salutations

You can edit existing addressee/salutations, or, if they are not in use on any records, delete them from the program. You can insert a new addressee/salutation at a specified point in the grid on the Addressee/Salutations page. To increase the versatility of your mailings and reports, you can also specify fields as additional choices when you build new addressee/salutations.

The management of addressee/salutations consists of the following procedures:

▶ **Edit an addressee/salutation**

You can edit addressee/salutations already in the program. Usually, you will probably want to create a new addressee/salutation rather than change an existing one. However, at some point you may need to change an established entry.

Scenario: You need to change the addressee/salutation "Dr. William and Margaret Smith" to include a spouse title. You have a relatively small database and do not think your organization will ever use the addressee/salutation in its current format. You would rather edit it than create an entire new addressee/salutation.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.
2. Click **Addressee/Salutations**. The Addressee/Salutations page appears.

3. In the grid, select Dr. William and Margaret Smiththe addressee/salutation to edit and click **Open** on the action bar. The Addressee/Salutation screen appears.

4. Click in the box on the far left of the **Spouse First Name** row. The entire row highlights.

5. Right-click and select **Insert Row**. In the grid, a new row appears above the **Spouse First Name** row.

Note: When you save changes to an addressee/salutation, all records that use that addressee/salutation that are not marked as editable are updated. If this involves a large number of records, a message appears to show the number of records affected and asks whether to continue. Any record specified as editable that you later make not editable is also affected by the change.

6. Click in the **Field Name** column of the new row. The down arrow appears. Click the down arrow to see a list of field choices. Select "Spouse Title 1" from the list. The **Preview** shows the edited addressee/salutation.

7. In the **Smart** column, mark the checkbox for the **Spouse Title 1** row and unmark it in the **Spouse Last Name** row. This avoids salutations of "Dr. and Smith" when you use the addressee/salutation with a constituent record that contains no entry for a spouse.Edit the selected addressee/salutation as necessary.

8. To save your changes, click **Save and Close** on the toolbar. You return to the Addressee/Salutations page. The edited addressee/salutation now appears in the list.

▸ **Insert an addressee/salutation into the Addressee/Salutation grid**

You can create a new addressee/salutation and insert it above an entry you select in the grid. If you create an addressee/salutation to be used frequently, you can place it at the top of the grid to speed data entry.

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

2. Click **Addressee/Salutations**. The Addressee/Salutations page appears.

3. In the grid, select the entry above which to place the new entry.

4. On the action bar, click **Insert**.

5. Follow the steps for "Add an addressee/salutation" on page 45.

6. To save the new addressee/salutation, click **Save and Close** on the toolbar. You return to the Addressee/Salutations page. The new addressee/salutation appears in the grid.

▸ **Delete an addressee/salutation**

You can delete only addressee/salutations that are not currently in use.

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

2. Click **Addressee/Salutations**. The Addressee/Salutations page appears.

3. Select the entry to delete.

4. On the action bar, click **Delete**. A verification message appears.

5. To delete the addressee/salutation, click **Yes**.

    If the addressee/salutation is in use on a record, a warning message appears. Click **OK**.

    You return to the Addressee/Salutations page.

▶ **Add fields as addressee/salutation choices**

You can add new symbols or words to use with your addressees and salutations.

> *Scenario:* You need to create a new addressee/salutation of "Mr. Smith and Guest" for invitations to your galas, parties, and other events. You need to add **Guest** as a field choice to create the new addressee/salutation.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.
2. Click **Addressee/Salutations**. The Addressee/Salutations page appears.
3. In the action bar, click **Fields**. The Addressee/Salutation Fields screen appears.
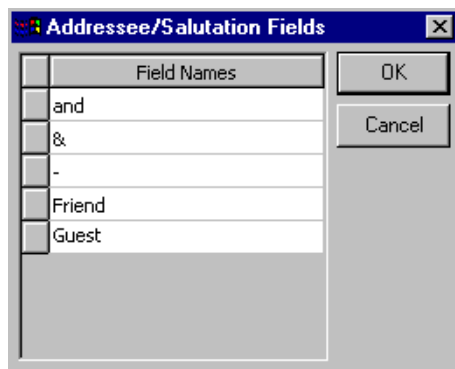
4. Scroll down to the bottom of the **Field Names** grid. In the last cell, enter the new field, such as **Guest**.
5. To save your addition, click **OK**. You return to the Addressee/Salutations page. When you edit an existing addressee/salutation or create a new one, the new field**Guest** now appears in the list of choices in the **Field Name** column.

▶ **Print addressee/salutations**

You can print a list of all your addressee/salutations to keep as records for your files or to create a checklist for mailings. You can also print separate detail reports for your addressee/salutations to show all the format options selected for each of them.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.
2. Click **Addressee/Salutations**. The Addressee/Salutations page appears.
3. In the Addressee/Salutations grid, right-click and select **Print**. A submenu appears.
   - To print a list of all the addressees and salutations in the grid, select **Grid only**.
   - To print a more detailed report, including the format options selected for each addressee/salutation, select **Addressee/Salutations Report**.

▶ **Move an address/salutation up or down in the grid**

> **Tip**: You can use this procedure to place the most popular entries at the top of the grid. They then appear at the top of the list when you click the down arrow in an **Addressee/Salutation** field. This saves you time scrolling through less used entries.

You can adjust the order addressee/salutations list in the grid.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.
2. Click **Addressee/Salutations**. The Addressee/Salutations page appears.
3. In the grid, select the addressee/salutation to move.

4. Click the up arrow to move the addressee/salutation up one line or the down arrow to move it down one line in the grid.

Attributes

To add flexibility to your record keeping, use attributes to define and store special information about a wide variety of record types. You can identify a category for the attribute and then store an entry specific to that category.

"More About Attributes" on page 54

"Attribute Types" on page 54

"Define Attributes" on page 55

"Manage Attributes" on page 58

More About Attributes

Make sure you do not confuse attributes with information such as constituent codes. We recommend that at least one constituent code appear on each constituent record to explain why it is in your database. For example, you can code constituents as Volunteers, Prospects, Alumni, or any other entry to specify why someone is a constituent. For information about constituent codes, see the *Constituent Data Entry Guide*.

Use attributes to define specialized information about your constituents and track information for which no field exists in *The Raiser's Edge*. For example, to more accurately target your solicitations, you can set up an "Interests" table for your constituents with entries such as Golf or Gardening.

Attributes are available on many screens and are specific by type. For example, attributes for a gift type are available only for gifts, not constituents or other records.

"Attribute Types" on page 54

"Define Attributes" on page 55

"Manage Attributes" on page 58

Attribute Types

Constituent Attributes. Use constituent attributes to track specialized information on constituent records, such as categories for "Special Interests", "Committees", and "Important Dates".

Gift Attributes. Use gift attributes to track specialized information on gift records, such as "Deposit Dates" and "Designations".

Action Attributes. Use action attributes to track specialized information on action records. For example, you can use a category for phone calls called "Phone Call Outcome" with entries such as "Busy — call again", "Left message with service", and "Left message with person".

Event Attributes. If you have the optional module *Event Management*, use event attributes to track specialized information on event records. For example, for a charity auction you can use a category called "Items Donated" to list the items to be auctioned as entries.

Participant Attributes. If you have the optional module *Event Management*, use participant attributes to track specialized information on participants in your events. For example, for a banquet, you can use the category of "Seating Preference" to enter any considerations for a participant.

Education Attributes. Use education attributes to track specialized information on constituent education records. For example, you can create a category named "Academic Honors" with entries such as "Phi Beta Kappa", or "Dean's List".

Campaign Attributes. Use campaign attributes to track specialized information on campaign records. For example, you can specify who the campaign manager is or whether the campaign targets major donors only.

Fund Attributes. Use fund attributes to track specialized information on fund records. For example, a hospital Equipment Fund may specify restrictions for what types of equipment can be purchased with proceeds from the fund.

Appeal Attributes. Use appeal attributes to track specialized information on appeal records. For example, you can specify different lists you purchased for a mailing so you can later determine which was most effective.

Package Attributes. Use package attributes to track specialized information on the Packages tab of appeal records. For example, if you have a package for a mailing of a glossy brochure, you can add a category called "Contacts" and add names of the employees you deal with at the printing company.

Address Attributes. Use address attributes to track specialized information on constituent address records. You can create a category called "Mail Types" and enter the type of mailing such as "Newsletter" or "Thank you letter" that should go to each specific address on a constituent record.

Job Attributes. If you have the optional module *Volunteer Management*, use job attributes to track specialized information on job records. For example, you can track the level of education required for a job — whether the job calls for a college or technical education, a high school education, or has no special education requirements at all.

Membership Attributes. If you have the optional module *Membership Management*, use membership attributes to track specialized information on membership records. For example, you can track why a membership is upgraded or downgraded (such as child went to college, new baby, or couple separated) or the origin of a membership (such as walk-in, mailing, or promotion).

Individual Relationship Attributes. Use individual relationship attributes to track specialized information for individual relationships of individual or organization constituents. When you add an individual relationship record to a constituent record, you can define special information such as interests, academic honors, or committees for the relationship.

Organization Relationship Attributes. Use organization relationship attributes to track specialized information for organization relationships of individual or organization constituents. When you add an organization relationship record to a constituent record, you can attach information such as the business hours of a company or whether the company is a public or private organization.

Account Attributes. Use account attributes to track specialized information for your bank accounts such as the specific purposes of an account, contacts at financial institutions, and who opened the account.

Proposal Attributes. If you have the optional module *Prospect Research Management*, use proposal attributes to track specialized information for your proposals such as specific interests of the prospect the proposal targets.

Define Attributes

You can create an entry for any type of information your organization tracks. You assign a category to each attribute. For example, you can assign a category of "Committees" to your constituent records. You can also add comments to the attribute such as "Constituent is a lifetime member of the Planning Committee."

▶ **Define an attribute**

You can identify the types of information to store and create new tables for your attributes. This procedure creates a new constituent attribute, but you can use similar steps to create any type.

> *Scenario:* You want to create a constituent attribute to track your constituents' interests. The attribute needs to be in the form of a table so you can define entries to help target your appeals.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.
2. Click **Attributes**. The Attributes page appears.

On the left, a list of attribute types appears. On the right, the attributes grid appears.

3. From the list, select the type of attribute to define, such as **Constituent**.
4. In the grid, click in the first available row in the **Description** column.

Note: The description you enter for an attribute in the grid on the Attributes page becomes the category on the Attributes grid in a record.
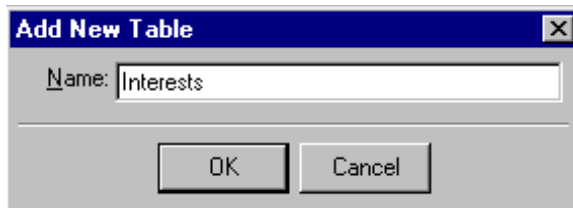
5. In the **Description** column, enter a category for the attribute, such as "Interests".

6. To move your cursor to the **Data Type** column, press **TAB** on your keyboard.

7. In the **Data Type** column, select the format for the attribute. For example, to select the attribute entry from a table, select "Table". For information about the data types, see "Attribute Data Types" on page 58.

Warning: You cannot change the data type on attributes with existing data.

8. If you select "Table" in the **Data Type** column, the **Table Name** column is enabled. To move your cursor to the **Table Name** column, press **TAB** on your keyboard. In the **Table Name** column, select an existing table with which to link the attribute or create a new table.

To create a new table for the attribute:
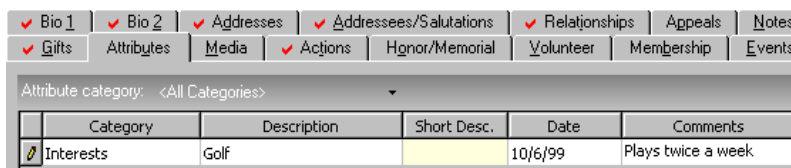
a. In the **Table Name** column, select "[Add New Table]". The Add New Table screen appears.

Note: You can create Attribute tables through the **Attributes** link; however, you add entries to the table through the **Tables** link of *Configuration*.

b. In the **Name** field, enter a unique name for the table such as "Interests".

c. Click **OK**. You return to the Attributes page. The new attribute entry appears in the grid.

9. To allow users to attach only one attribute to a record, such as only one interest to a constituent record, mark the checkbox in the **Allow Only 1 per Record** column.To allow users to attach multiple attributes to a record, do not mark this checkbox.

10. To require users select an entry for an attribute before they can save a record, mark the checkbox in the **Required** column. To not make an attribute entry a requirement to save a record, do not mark this checkbox.

11. To allow users to select the attribute on records of the applicable type, mark the checkbox in the **Active** column.

    To not display the attribute on records of the attribute type, such as if your organization no longer tracks the attribute, unmark this checkbox. When you unmark this checkbox, the attribute no longer appears as a selection on records of the attribute type.

12. If you add a new table as the data type, enter the entries for the new table.

    a. At the top of the Attributes page, click **Configuration**. The Configuration page appears.

    b. Click **Tables**. The Tables page appears. The new table appears in the list of tables on the left.

    c. To add entries to the new table, follow the procedure for "Add a table entry" on page 11. For example, when you include entries such as "Golf" or "Tennis" for an Interests table, you can target appeals or events such as an annual golf tournament for your constituents according to their interests.

    d. Once you enter data into the table, click **Configuration**. The Configuration page appears.

    e. Click **Attributes**. You return to the Attributes page. In the grid, the **Data Type** and **Table Name** columns in the row of the attribute with the new table are locked. You cannot edit these columns.

13. To associate the attribute with a record:

    a. In *Records*, open the record to associate with the attribute. For example, for an attribute for a constituent, open a constituent record.

    b. Select the Attributes tab.

    c. In the **Category** column, the descriptions entered in *Configuration* for active attributes appear as selections. Select the description of the attribute to associate with the record.

      d. In the **Description** or **Short Desc**. column, the entries entered in *Configuration* for the attribute appear as selections. Select the entry for the attribute to associated with the record. For example, if you select a data type of "Table" for the attribute, select the entry from the list defined in the **Tables** link of *Configuration*.

      e. In the **Date** column, enter the date you associate the attribute with the record.

      f. In the **Comments** column, enter any additional useful information about the attribute.

    14. Click **Save and Close**. You return to *Records*.

Attribute Data Types

On the Attributes page, in the **Data Type** column, you select the data type of each attribute. The data type you select determines the data entry format accepted for the attribute.

- Text - To enter free-form text, select Text. This is the least restrictive data entry format. However, since the Text format does not allow you to maintain consistency in your database, we recommend you select this format only when no other data types are applicable.

- Number - To enter only positive integers, select Number. For example, you can enter "4", but not "four". You cannot enter decimals or negative numbers.

- Date - To enter only dates that include a day, month, and year, select Date.

- Currency - To enter a monetary value, select Currency.

- Yes/No - To enter only a value of either Yes or No, select Yes/No.

- Table - To select a value from a table in the database, select Table. When you select this format, the **Table Name** column is enabled so you can select the table with which to link the attribute.

Note: To link a constituent record as an attribute on another constituent record, in the **Data Type** column, select "Constituent Name".

- Constituent Name - To search for and select a constituent from your database, select Constituent Name. When you select this format, the Open screen for constituents appears so you can find a constituent to store as an entry.

- Fuzzy Date - To enter incomplete dates, such as a year only, select Fuzzy Date. For more information about how to enter partial dates, see the "Program Basics" chapter of the *Program Basics Guide*.

Manage Attributes

You can define new attributes using a variety of data types. You can edit existing attributes and determine the order in which they appear in the grid on the Attributes screen. If your organization no longer uses an attribute on any records, you can delete it from the program.

Attribute management consists of the following procedures:

- "Determine the order of attributes in the grid" on page 58

- "Delete an attribute" on page 59

- "Print attributes" on page 59

▶ **Determine the order of attributes in the grid**

Tip: The order you set here determines the order of the attributes when you click the down arrow in the **Category** column on a record. You can place your most popular entries at the top to save time scrolling through your less used entries during data entry.

You can determine the order in which attributes appear in the Attributes grid.

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

2. Click **Attributes**. The Attributes page appears.

3. From the list, select the type of attribute to sort.

4. In the grid, select the row of the attribute to move in the order.

5. On the action bar, click **Up** or **Down** to the move the selected attribute up or down one line in the grid.

▶ **Delete an attribute**

Note: If an attribute your organization no longer uses appears on records, you can make the attribute inactive rather than delete it. Inactive attributes no longer appear as selections when you assign attributes to records. To make an attribute inactive, unmark its checkbox in the **Active** column on the Attributes page.

You can delete only those attributes which are not in use on any records. This procedure details how to delete a constituent attribute, but you can follow the same steps to delete any type.

If an attribute your organization no longer uses appears on records, you can make the attribute inactive rather than delete it. Inactive attributes no longer appear as selections when you assign attributes to records. To make an attribute inactive, unmark its checkbox in the **Active** column on the Attributes page.

Scenario: A worker at your organization decides to delete a constituent attribute of "Committees" to list the committees on which a constituent serves. The attribute is currently used on several constituent records.

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

2. Click **Attributes**. The Attributes page appears.

3. From the list, select the type of attribute to delete, such as **Constituent**.

4. In grid, place the cursor in the **Description** column of the attribute to delete.

5. Click the box on the far left of the row. The entire row is selected.

To select multiple rows simultaneously, select a single row, hold the left mouse button down, and move the mouse up or down to select the rows.

6. Press **DELETE** on your keyboard. A message appears to verify the deletion of the selected rows.

Note: When you delete an attribute with a data type of "Table," you must first delete the attribute and then delete the table in the **Tables** link.

7. To delete the attribute, click **Yes**.

If the attribute is not in use on any records, the program deletes it. You return to the Attributes page.

If the attribute appears on a record, you cannot delete it. A message appears to inform you that the attribute is in use. Click **OK**. You return to the Attributes page. To delete the attribute, you must first run a query to find all records that include the attribute and remove the attribute from each record.

▶ **Print attributes**

You can print simple lists for each type of attribute or a detailed report of all attributes to keep for your files.

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

2. Click **Attributes**. The Attributes page appears.

3. From the list, select the type of attribute to print, right-click, and select **Print**. A submenu appears.

   • To print a list of attributes as they appear in the grid, select **Grid only**. The program sends a list of attributes of the selected type to the printer.

- To print detailed information for each attribute in the grid, such as the data type and whether the **Allow only one** and **Required** checkboxes are marked, select **Attributes Report**. The program sends information for each attribute of the selected type to the printer.

Financial Institutions

You can create bank records to store information such as account names and numbers, user numbers, locations of bank branches, transit/routing numbers, and customized notes.

This option is usually used in conjunction with the optional module *Electronic Funds Transfer* to facilitate your electronic funds transfers; however it can be used to track information even if you do not have *Electronic Funds Transfer*. For more information on how to build an electronic funds transfer file, see the *Electronic Gifts (EFT) Guide*.

Want to know about how to "Add Financial Institutions" on page 60? About how to "Manage Financial Institutions" on page 64?

Add Financial Institutions

You can add a financial institution and include information such as the name and address of a bank, and whether it is a branch where you transfer funds electronically.

- "Add a financial institution in Configuration" on page 60
- "Add a financial institution through the Relationships tab of the constituent record" on page 61

▶ **Add a financial institution in Configuration**

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

2. Click **Financial Institutions**. The Financial Institutions page appears.
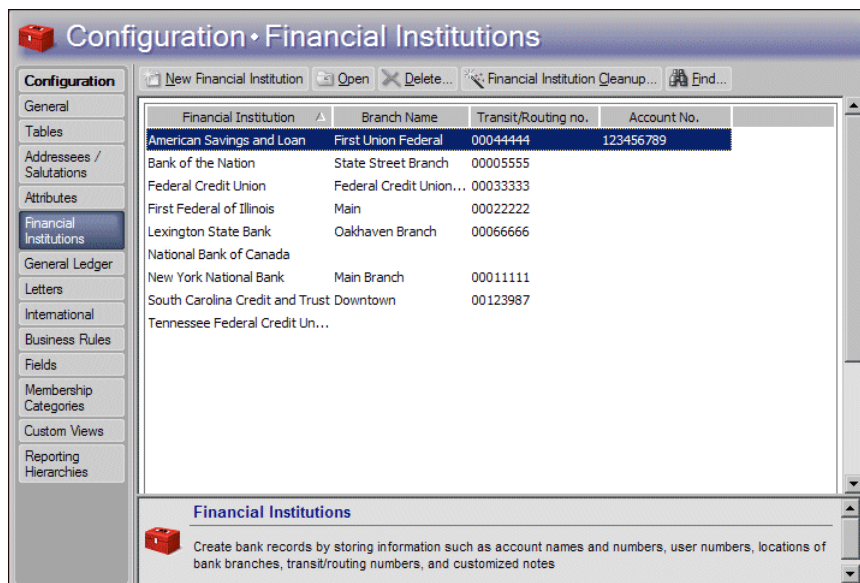
3. On the action bar, click **New Financial Institution**. The New Bank/Branch screen appears.

4. To add a branch for the bank, in the **Bank** field, select the bank for which you add the new branch. In the **Branch** field, enter the name of the branch.

   To add a new bank, you must have security rights to add it as a table entry in the **Bank** field.

5. In the **Address lines**, **City**, **State**, **ZIP**, and **Region** fields, enter address information for the institution.

6. In the **Phones/Email/Links** grid, enter the phone **Type** and **Number** for the institution. To specify a phone number as "Do Not Call", click in the **DNC** column.

Note: If you use *Electronic Funds Transfer* but process your direct debit transactions through IATS rather than your financial institution, you do not need to establish your sponsoring bank.

7. If you process direct debit transactions using *Electronic Funds Transfer* and this is a branch where you transfer funds electronically, mark **Sponsoring Bank**. Under **Sponsoring Bank**, enter the account name, account number, and user number your organization uses with the bank.

   If you do not have *Electronic Funds Transfer*, you can only track information under **Sponsoring Bank**. You cannot use it to create a transfer file.

8. Under **Electronic Transfer Information**, enter the transit or routing number the bank uses to direct electronic transfers. Your financial institution assigns your account and user numbers.

9. For **Immediate origin**, select whether the bank should use the transit or routing number or another number to track the origin of electronic files. If you select **Other**, enter the number in the provided field. If you do not have *Electronic Funds Transfer*, you can use this information for tracking purposes only.

10. In the **Notes** box, enter any additional information about the institution, such as the name of the branch manager or any other person your organization contacts frequently.

11. To save your entry, click **Save and Close** on the toolbar. You return to the Financial Institutions page.

▶ **Add a financial institution through the Relationships tab of the constituent record**

Note: If you do not have security rights to add financial institutions in *Configuration*, you cannot add them through the Relationships tab on the constituent record.

You can add a bank to *Configuration* through the Relationships tab of a constituent record.

1. Open a constituent record to which you want to add a new financial institution. For more information about how to open a constituent record, see the "Constituent Records" chapter of the *Constituent Data Entry Guide*.

2. Select the Relationships tab.
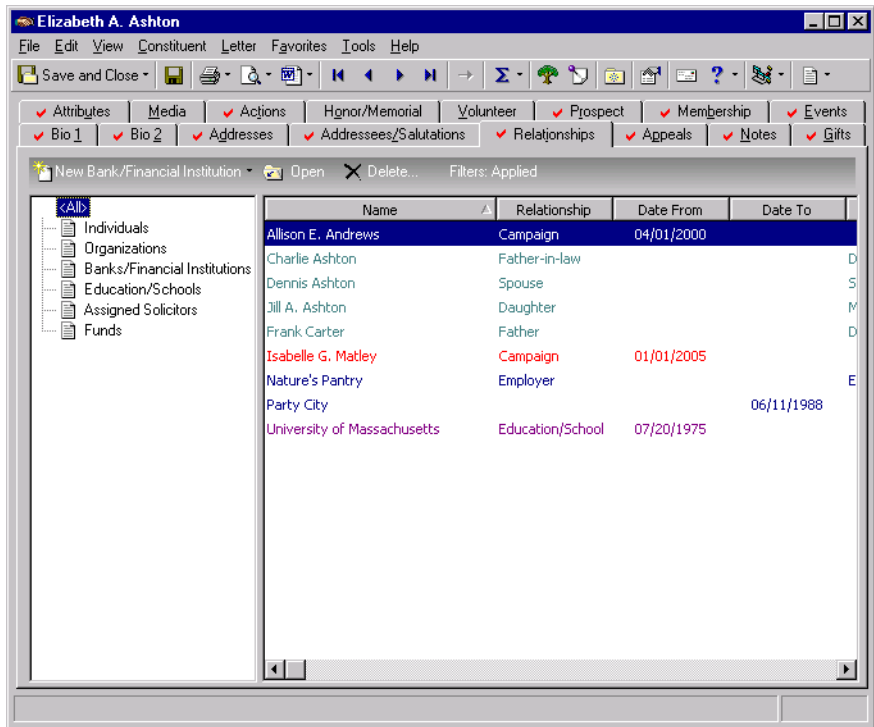
3. From the tree view on the left, select **Banks/Financial Institutions**.

4. On the action bar, select **New Bank/Financial Institution**. The New Bank/Financial Institution screen appears.

5. Enter the information for the new financial institution. For a detailed explanation of the fields on this screen, see "Add a financial institution in Configuration" on page 60.

6. Click **Save and Close**.

7. If the institution has not already been added to your database, a message appears. To add the financial institution to *Configuration*, click **Yes**. After you add the financial institution, or if it is already present in *Configuration*, but the branch is new, another message appears. To add the branch to the grid on the Financial Institutions page of *Configuration*, click **Yes**.

Clean Up Financial Institutions

The Financial Institution Cleanup utility allows you to replace duplicate financial institution records in your database. You select one or multiple financial institution records to be replaced, then specify a single financial institution to replace them with. As part of the cleanup, any constituent and other records associated with the duplicate financial institution change to show an association with the replacement financial institution. However, it is important to note that account numbers do not change on any financial institution records or on any associated constituent, gift, or other records.

> **Note**: You can also use the Financial Institution Cleanup utility to combine banks. For example, if the 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 constituent and gift records.

For example, in your database you may notice that "Lexington State Bank" also has a record as "Lexington Bank," and the bank appears on constituent and gift records both ways. With the cleanup utility, you can delete the incorrect duplicate, Lexington Bank, and replace it with Lexington State Bank. Lexington State Bank then appears correctly on all associated gift and constituent records. You can also specify to update all phone numbers, email addresses, and other links on associated records to show the information from the corrected financial institution record. Again, the Financial Institution Cleanup utility does not change any account numbers.

Additionally, you can specify to automatically delete any institutions that are being replaced from your database.

▶ **Clean up financial institutions**

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

2. Click **Financial Institutions**. The Financial Institutions page appears.
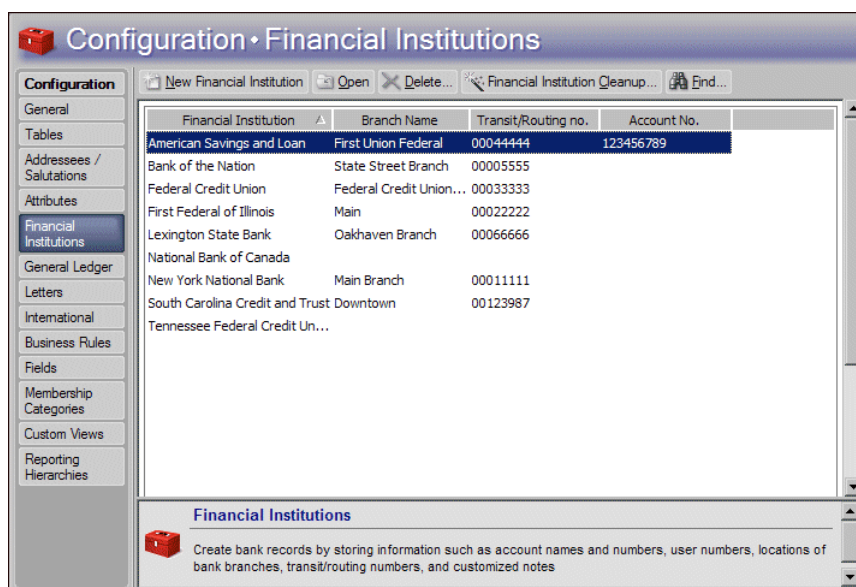
3. On the action bar, select **Financial Institution Cleanup**. The Financial Institution Cleanup screen appears.

4. In the **Replace these Financial Institution Records** grid, select the financial institution records to be replaced.

Note: The Financial Institution Cleanup utility does not alter account numbers on any records.

5. In the **Replace with** field, select the financial institution record to replace the records selected in the **Replace these Financial Institution Records** grid.

6. To remove the duplicate financial institution records from your database, mark **Delete financial institutions being replaced**.

7. To change the financial institution information on associated constituent and other records to show the information of the replacement financial institution instead of the duplicate, mark **Add Phone/Email/Links from the financial institution record in the 'Replace with' field to the financial institution relationship records for all associated constituents**.

   For example, if you replace "Lexington Bank" with "Lexington State Bank" and any phone numbers, email addresses, or other links are entered differently for the two, the information on the Lexington State Bank record replaces that from the Lexington Bank on all associated constituent and other records.

8. To clean up the selected financial institutions and associated records, click **Replace Now**.

9. When the cleanup is complete, a message appears. Click **OK**.

10. To exit the utility, click the 'x' in the upper right of the Financial Institution Cleanup screen. You return to the Financial Institutions page.

Manage Financial Institutions

Note: You can add financial institutions in *Configuration* and on the Relationships tab of a constituent record.

You can add new financial institution records, and edit and delete existing records. If you add a financial institution as a relationship on a constituent record, *The Raiser's Edge* asks whether to add the new bank to *Configuration*. You cannot delete a financial institution record that is linked to constituent records. You must remove it from all records before you can delete it from your database.

The management of financial institutions consists of these procedures:

- "Edit a financial institution" on page 65
- "Delete a financial institution" on page 66
- "Print financial institutions" on page 66

▶ **Edit a financial institution**

Occasionally, you may need to change the information for a bank. For example, address information may need updating, electronic transfer information can change, or a bank may merge with another financial institution.

Scenario: The Oakhaven branch of the Lexington State Bank has moved to a new building. You need to update your address information for the institution.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.
2. Click **Financial Institutions** link. The Financial Institutions page appears.
3. Select Lexington State Bankthe bank to edit.
4. Click **Open**. The Lexington State Bank - Oakhaven Branchbank record appears.

> **Note**: To make data entry easier, press **F7** while the cursor is in the **Address lines** field to zoom in and change the view.

5. In the **Address lines** field, enter the new address information. If necessary, you can also change the information in the other address and phone fieldsMake the necessary changes.
6. To save changes, click **Save and Close** on the toolbar. You return to the Financial Institutions page**.**

▶   **Delete a financial institution**

You can remove a bank record from the Financial Institutions grid. You can delete only banks that are not present on constituent or gift records.

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

2. Click **Financial Institutions**. The Financial Institutions page appears.

3. Select the institution to delete.

4. On the action bar, click **Delete**. A verification message appears.

5. Click **Yes**.

   • If the financial institution is not present on any constituent or gift records, it is deleted. You return to the Financial Institutions page.

   • If the financial institution is present on any records, a message appears. Click **OK**. You return to the Financial Institutions page. You must remove the bank from any records before you can delete it.

▶   **Print financial institutions**

You can print a list of all your financial institutions and banks or a detailed profile of each institution to keep for your records.

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

2. Click **Financial Institutions**. The Financial Institutions page appears.

3. Select the institution for which to print information.

4. In the Financial Institutions grid, right-click and select **Print**. A submenu appears.

   • To print a list of all the institutions in the grid, select **Grid only**. Your printer produces a list of the institutions in the grid.

   • To print a detailed report for an institution that includes address, phone, and electronic fund transfer information, select the institution in the grid, right-click, and select **Print**, **Bank Profile**.

General Ledger

You can establish program settings for the interface between **The Raiser's Edge** and Blackbaud's **General Ledger** accounting software. These settings allow the two programs to work together so you can enter gifts once for both programs to save time. If you have **General Ledger**, you must specify the location of its database and whether it is a single or multi-user version. You can specify that **General Ledger** automatically check the validity of account and project information entered into **The Raiser's Edge**. You can also define Journal Reference Fields to use in the **Post to General Ledger** link of *Administration* for posting detailed gift transactions.

When you have the latest version of Blackbaud's **General Ledger** in **The Financial Edge**, you can enter **General Ledger** information used in **The Raiser's Edge** Accountability Summary. Additionally, if you have **The Financial Edge** optional module *Project, Grant and Endowment Management*, you can specify that a **Financial Edge** transaction code be placed on all appeal and (if you have the optional module *Event Management*) event records you add in **The Raiser's Edge**. That way, you can associate **Financial Edge** expenses with your **Raiser's Edge** appeals and events.

Warning: To run the Accountability Summary or use transaction codes on appeals, **The Financial Edge** must be installed on the same workstation as **The Raiser's Edge**, and you must have logged into **The Financial Edge** at least once.

To save data entry time, you can also enter GL Distribution information that defaults into each new fund you create. The information is only a default, and you can change it in individual funds if necessary. Credit and debit account information for gift types and subtypes is accessed directly from the *General Ledger* database, so when you add a fund to gifts in *The Raiser's Edge*, the accounts you specified are automatically debited and credited in *General Ledger*. If you have the *Financial Edge* optional module *Project, Grant and Endowment Management*, you can also specify default gift distributions among multiple projects.

If you do not have Blackbaud's *General Ledger*, you can still use this link to send transaction details to your accounting software and print a report of posted transactions.

• "Establish General settings for the interface between The Raiser's Edge and General Ledger" on page 67

• "Establish default GL Distribution settings" on page 71

• "Establish settings when General Ledger is not present" on page 72

▶ **Establish General settings for the interface between The Raiser's Edge and General Ledger**

All options for setting the interface between *General Ledger* and *The Raiser's Edge* are located on the General Ledger"General Ledger" on page 66 page. The information you enter on this screen is used in gift and fund records, queries, exports, and the **Post to General Ledger** option in *Administration*.

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

2. Click **General Ledger**. The General Ledger page appears.

3. Select **General**.

4. If you have Blackbaud's *General Ledger*, mark **Blackbaud General Ledger present**.

5. In the **Database type** field, select the type of database your version of *General Ledger* uses.

   • If you use *General Ledger* 6.x or a version of *The Financial Edge* prior to 7.2, select "Sybase ASA" and go to step 6.

   • If you use *The Financial Edge* 7.2, select "SQL Server" and go to step 9.

6. Select whether your database is accessed by many computers through a network or by only your computer.

• If you have a multi-user version of *General Ledger*, select **Network**.

In the **Server name** field, enter the name of the server for your *General Ledger* database engine. This name allows *The Raiser's Edge* to establish a link with the *General Ledger* Sybase ASA database.

Note: Your network administrator should be able to supply you with your **Server name** and **Alias** if you do not know it.

If you use an alias for your *General Ledger* database, enter it in the **Alias** field. All computers on your network use this name to locate the database linking *The Raiser's Edge* and *General Ledger*.

• If you have a single user version of *General Ledger*, select **Local**.

In the **Database path** field, enter the path to the Blackbaud database file folder in *General Ledger*. If necessary, click **Browse** to find the path to the folder.

7. To test the connection to *The Financial Edge* database, click **Establish connection and enable options**. If the connection is successful, a message appears to inform you of this, and the **Accountability Options** frame is enabled.

8. Go to step 12.

9. When you select "SQL Server" as the **Database type** to establish a link with **The Financial Edge** 7.2, several fields appear.

Warning: If you previously linked to a Sybase ASA database with another version of **General Ledger**, and the database to which you linked is still available, you must log out of **The Raiser's Edge** and log back in before you will be connected to your SQL Server database.

    a. In the **Server name** field, select the server on which your **Financial Edge** SQL Server database resides.

    b. In the **Database name** field, enter the name of the database to which you connect.

If you previously linked to a Sybase ASA database with another version of **General Ledger**, and the database to which you linked is still available, you must log out of **The Raiser's Edge** and log back in before you can connect to your SQL Server database.

10. To have **The Raiser's Edge** search the **General Ledger** database to determine whether the account numbers and project IDs entered on fund records and other areas of **The Raiser's Edge** exist in **General Ledger**, mark **Validate GL information**. This can help eliminate errors caused by incorrectly entered account numbers.

11. To test the connection to **The Financial Edge** database, click **Establish connection and enable options**. If the connection is successful, a message appears to inform you of this, and the **Accountability Options** and **Expense Tracking and Appeal Posting** frames are enabled.

12. To run the Accountability Summary, enter information under **Accountability Options**. If you intend to run the summary, you must specify information from *The Financial Edge* to use in the Accountability Summary.

In the **Account Attribute** field, select the attribute established in *The Financial Edge* to group accounts together. This must be a "table" type attribute. An attribute must be added to at least one *Financial Edge* expense account before it appears in the **Account Attribute** dropdown.

The table entry values will appear in the Accountability Summary.

13. To view budget distribution information on the Accountability Summary, mark **Show Budgeted Distribution**. When you mark this checkbox, you must select an entry in the **Budget Scenario** field. Budget scenarios are established in *The Financial Edge* and used in the Accountability Summary to show how a gift will be spent based on how a given project is budgeted.

A budget scenario is a single version of an organization's budget for a given fiscal year. If you have *The Financial Edge* optional module *Budget Management*, you can create multiple budget scenarios. For example, you can create a scenario of your original budget and also create scenarios for various revisions of that budget.

14. To have *The Raiser's Edge* look at transactions in *Financial Edge* transfer and loss accounts when it determines how money donated to a fund is spent, mark **Include Loss Accounts** and **Include Transfer Accounts**. You can mark one, both, or neither of these checkboxes.

15. If you specify a SQL Server database in the **Database type** field, the **Expense Tracking and Appeal Posting** frame appears. To include *Financial Edge* transaction codes on new appeals and, if you have the optional module *Event Management*, new event records, you must enter information under **Expense Tracking Options**. When you include transaction codes on these records, you can use the codes to track *Financial Edge* expenses for the records.

Note: In *The Financial Edge*, a transaction code helps categorize information to report and close fiscal years. Transaction codes are available with *The Financial Edge* optional module *Projects and Grants*.

    a. In the **Transaction Code** dropdown list, all transaction codes established in *The Financial Edge* appear. We recommend you create a transaction code in *The Financial Edge* especially for your *Raiser's Edge* appeal and event records. Select the transaction code in *The Financial Edge* to associate with appeals and events in *The Raiser's Edge*.

b. To post gifts for a given appeal with the selected transaction code, mark **Apply Transaction Code associated with gift appeal when posting**.

c. Under **Automatically generate Transaction Code table entries for new records of the following type**, select whether to generate Transaction Code table entries for appeals or events. When you select a transaction code and mark **Appeals** and **Events**, a **Financial Edge Transaction Code** field and **View GL Expenses** button appear on the appeal record Attributes/Expenses tab and event record Expenses tab. When you save a new appeal or event, a table entry is created in *The Financial Edge* for the selected transaction code. The table entry equals the name of the appeal or event. The table entry also appears on the appeal or event record in the **Financial Edge Transaction Code** field.

In *The Financial Edge*, you can associate *General Ledger* expenses with individual transaction code table entries. You can view any *Financial Edge* expenses you associate with a transaction code table entry for an event or appeal by clicking the **View GL Expenses** button on the appeal or event record. For more information, see *The Raiser's Edge and The Financial Edge: An Integrated Solution for Nonprofits Guide*.

16. Under **Journal References**, select reference fields. When you post detailed transactions, *The Raiser's Edge* sends these fields to *General Ledger* as a description.

Note: You can create a field name of up to twenty characters. The total length of the journal reference can be up to fifty characters.

To define additional Journal Reference fields, or to insert spaces between fields:

a. Click **Fields**. The Journal Reference Fields screen appears.
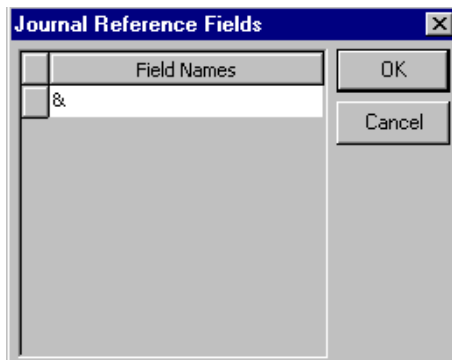
b. Define the additional fields or space between fields.

c. Click **OK**. You return to the General Ledger page.

17. The **Sample** display shows how the fields selected for the journal will appear. To re-establish program settings, click **Reset to System Defaults**.

18. When you leave the General Ledger page, the program saves your settings automatically.

▶ **Establish default GL Distribution settings**

You can create a default GL distribution. To save data entry time, the distribution settings you enter here default into each new fund you create; however, the information is only a default, and you can change it in individual funds if necessary.

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

2. Click **General Ledger**. The General Ledger page appears.

3. Select **GL Distributions**. The **GL distributions** grid appears.

If your fund has multiple project distributions, we recommend you select one project for each fund on the GL Distributions tab on the fund record. If you do not select one project per fund, the project assigned to the gift type of Cash is applied to the fund record when posting to *The Financial Edge*.

4. If you have funds with multiple project distributions, such as a separate project distribution for each gift type for one fund, the **Remove Project column from fund GL Distributions grid** checkbox appears.

    To define a project once instead of on each line of the grid on a fund record, mark this checkbox. When you mark the checkbox, a **Project** field appears instead of a grid column on the GL Distributions tab of a fund record. You can enter a project or project distribution once in the field instead of in each row of the **Project** column.

    To clean up your project distributions by designating one project per fund, mark this checkbox. Then, on the GL Distributions tab of a fund record, select one project for the fund.

    If you more only one project distribution for each fund, the **Remove Project column from fund GL Distributions grid** checkbox does not appear.

5. In the **GL distributions** grid, establish default settings for the GL Distributions tab on a new fund record. You can set up these defaults for each gift type in the columns of **Debit Account Number**, **Debit Account Desc**, **Credit Account Number**, **Credit Account Desc**, and **Interfund**.

    When you add a new fund record, any information entered in the **GL distributions** grid automatically appears on the GL Distributions tab on the new fund record. You can change the GL Distribution information on the record.

6. When you leave the General Ledger page, the program automatically saves your settings.

▸ **Establish settings when General Ledger is not present**

If you do not have *General Ledger*"General Ledger" on page 66, you can configure *The Raiser's Edge* to work with other accounting software.

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

2. Click **General Ledger**. The General Ledger page appears.

Do not mark **Blackbaud General Ledger present**. The **Database path** field and the **Validate General Ledger information** checkbox are disabled.

3. In the **Journal References** frame, select the fields to send as transaction descriptions to other accounting software. The number you enter in the **Length** column is the number of characters to allow for the corresponding entry in the **Reference Field Name**.

Note: You can create a field name of up to twenty characters. The total length of the journal reference can be up to fifty characters.

The number of characters in the **Length** column is always included for a particular name, even if the name itself consists of less characters than the number specified. For example, if you select a length of "10" for a reference field name of "Constituent ID", and the ID consists of only six characters, the ID is followed by four spaces in the post. For more information on how to use this information, see the "Posting to General Ledger" chapter of the *Gift Record Guide*.

To re-establish program settings, click **Reset to System Defaults**.

4. To save your settings, exit the General Ledger page.

Letters

Note: On the File Locations tab in User Options, you can specify a directory where you store files created in *The Raiser's Edge* in a word processing format.

On the Letters page, add letters and give them corresponding descriptions in *The Raiser's Edge*. Choose from letter types of Gift, Action, Constituent, Membership (if you have the optional module *Membership Management*), Event (if you have the optional module *Event Management*), or Appeal.

If you have *Microsoft Word 2000* or higher, you can use the *Office* integration features of *The Raiser's Edge* to create *Word* documents containing the merge fields from your export for your mailings. When you create an action, gift, and constituent letter, you can associate the letter with a simple or conditional *Word* merge export so you can use the letter to perform mail merges from constituent, action, or gift records. The export defines the main document and *Raiser's Edge* merge fields to use for the letter.

You can store letter information in the grid on the Letters page. The Letters grid lists letters by description and file location.

Add Letters

You can create documents in *Microsoft Word* that contain *Raiser's Edge* merge fields for use in mailings.

▶ **Add a letter**

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

2. Click **Letters**. The Letters page appears.
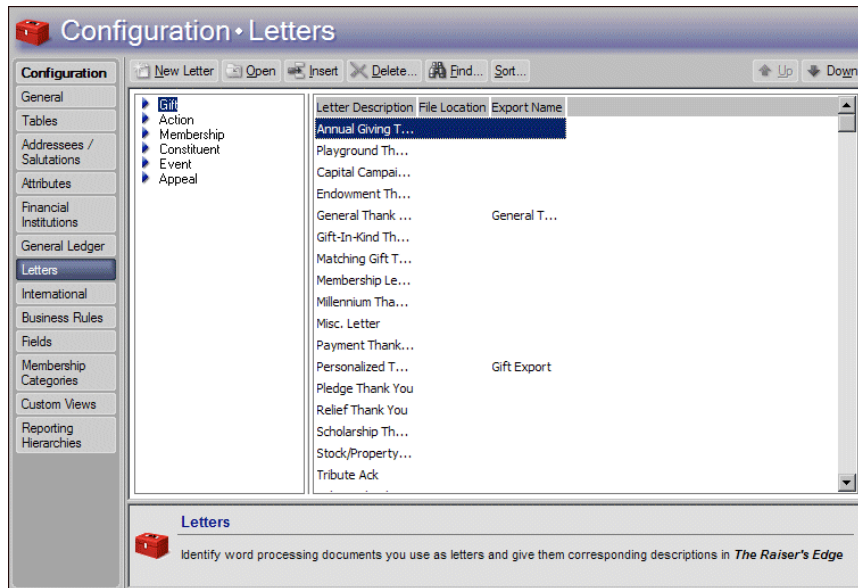
The letter types list on the left in the Letter Types box. When you select a type, you can view all letters you defined for that category in the Letters grid on the right.

The letter types are: **Gift**, **Action**, **Membership** (if you have the optional module *Membership Management*), **Constituent**, **Event** (if you have the optional module *Event Management*), and **Appeal**.

3. In the Letter Types box, select the type of letter to add.

4. On the action bar, click **New Letter**. The New Letter screen appears.
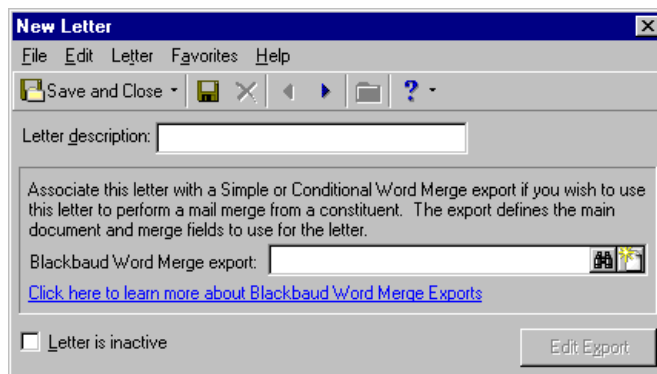
5. In the **Letter description** field, enter a description to help identify the letter. The description appears in the Letters grid on the right side of the main Letters page and in the list of entries for the **Letters** table. The **Letters** table contains all letter descriptions you can assign to an action, gift, event, or membership.

Note: The **Blackbaud Word Merge export** field is not available for all letter types.

6. When you create constituent, action, or gift letters, the **Blackbaud Word Merge export** field is available. To use this letter to perform mail merges from constituent, action, or gift records, associate the letter with a simple or conditional *Word* merge export. To access the Open screen for exports, click the binoculars.

7. From the Open screen, search for an export file you already created and saved for a mail merge, or create a new export file for a mail merge. To create a new export file for this letter, click **Add New**. The New Export screen for the type of letter you create. For example, if you create a constituent letter, the New Constituent Export screen appears.
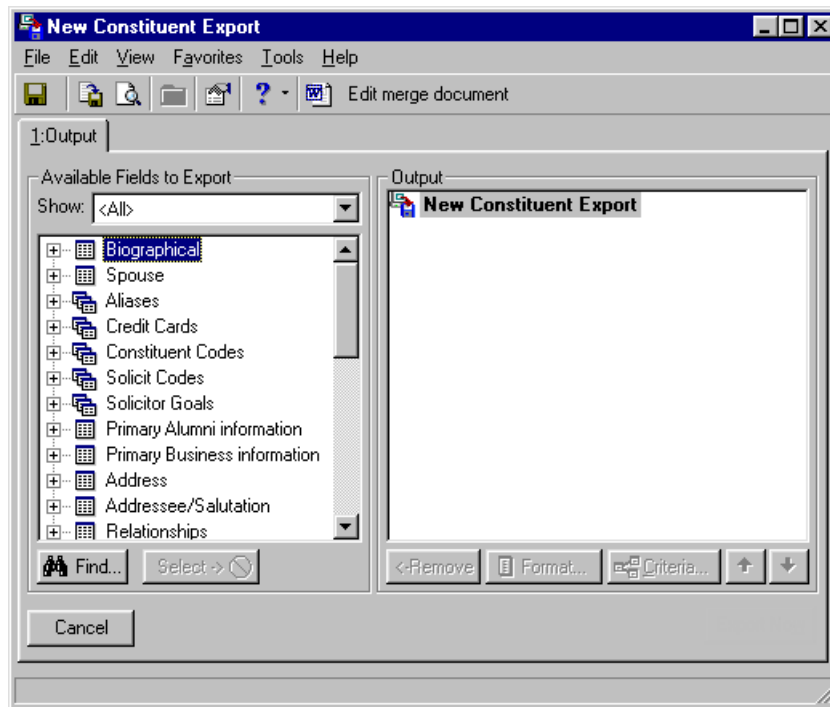
On the Output tab, select the merge fields to use in your letter.

8. In the **Available Fields to Export** box, click the plus sign on the left of a category to view the fields in that category. To move a field into the **Output** box, double-click the field or select it and click **Select**. For example, when you create a constituent letter, you may want to include **Last Name**, **Name**, and **Title 1**, under the Biographical category, and **Address line 1**, **Address line 2**, **City**, **State**, and **ZIP** under the Address, Preferred Address category.
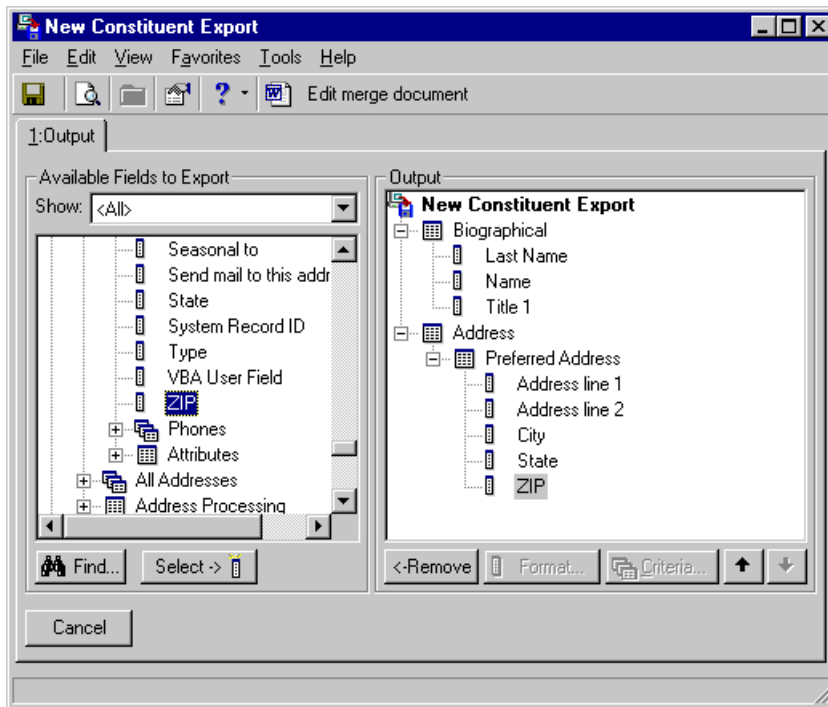
9. After you move all the fields to use in the letter into the **Output** box, click **Edit merge document** in the toolbar. Microsoft *Word* opens and a blank Merge document appears.
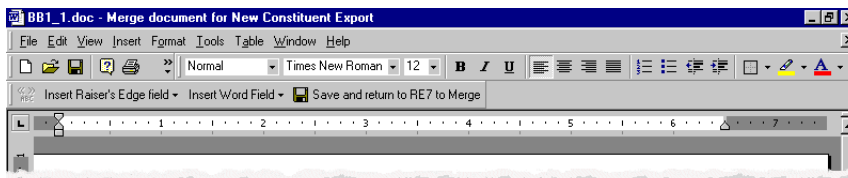
10. As you compose your merge document, insert merge fields into the letter. When you print the letter, *The Raiser's Edge* exports the correct information, which appears in the designated areas (placeholders) of your letter.

You will likely want to first enter merge fields for the constituent's name and address block of the letter. With your cursor flashing in the left corner of the work space of your letter, click **Insert RE7 field** on the toolbar, and then select a field category and a specific field. For example, to begin with the constituent's title, select **Biographical**, **Title 1**.
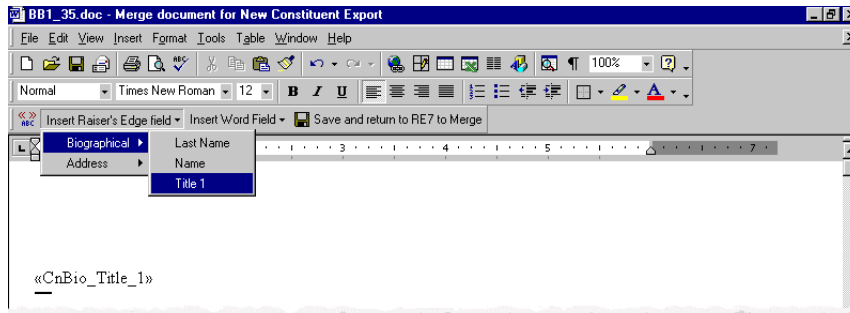
To include the address information underneath the title, use the same steps to add the address fields included in the export.

11. Enter merge fields for the salutation of the letter. Move down and type the greeting of your letter such as "Dear". Press the space bar on your keyboard. On the toolbar, click **Insert RE7 field** and select **Biographical**, **Title 1**. Press the space bar on your keyboard. Click **Insert RE7 field** and select **Biographical**, **Last Name**. Type a colon. Move down, and compose the body and closing of your letter.
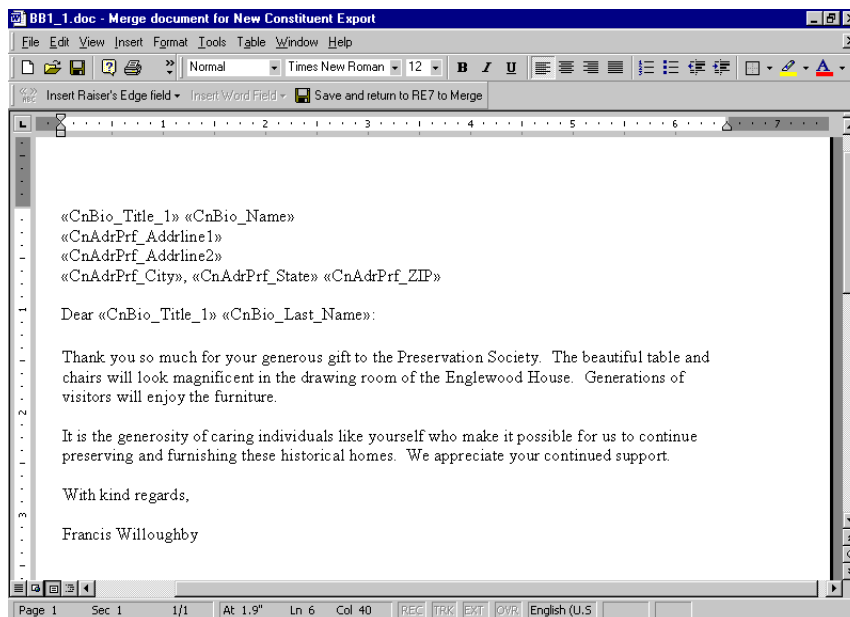
12. On the toolbar, click **Save and return to RE7 to Merge**.

13. You return to the New Constituent Export screen, from the menu bar, select **File**, **Save as**. The Export file name screen appears.

   To save the Constituent Export to use with the new letter (or any other letter), click **Save** on the toolbar. The Save Export As screen appears, so you can name and describe the export you save.

To close the New Constituent Export screen, click the "X" in the top right corner. You return to the New Letter screen.
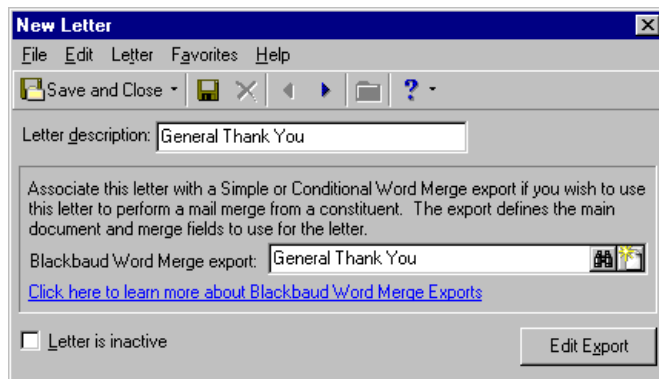
14. On the New Letter screen, the name of the new export now appears. To open and edit the export, click **Edit export**. To return to the Letters page of *Configuration*, click **Save and Close**.

The new letter now appears on the Letters page.

▶ **Add a letter using classic view**

If you do not want to take advantage of *The Raiser's Edge* integration with Microsoft *Word*, you can use "classic view" to add letters and manually configure merge fields.

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

2. Click **Letters**. The Letters page appears.
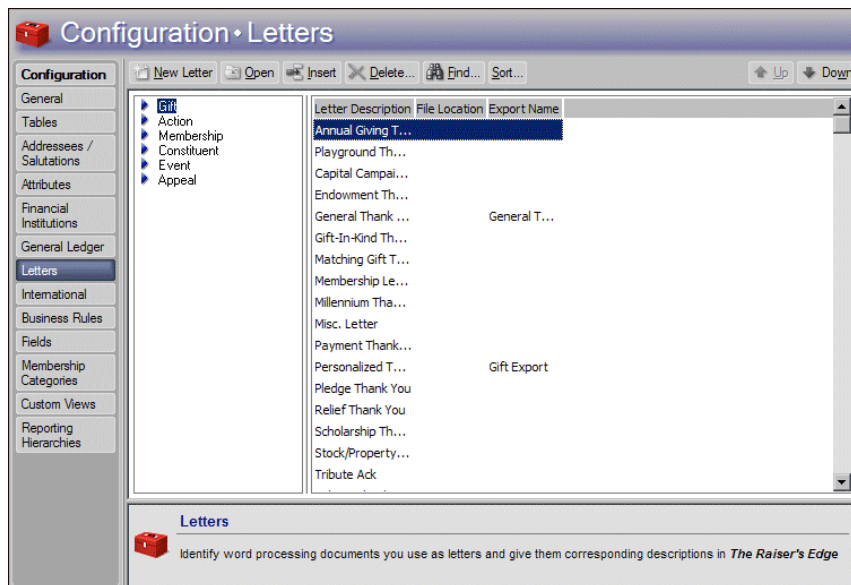
The letter types list on the left in the Letter Types box. When you select a type, you can view all letters you defined for that category in the Letters grid on the right.

The letter types are: **Gift**, **Action**, **Membership** (if you have the optional module *Membership Management*), **Constituent**, and **Event** (if you have the optional module *Event Management*).

3. In the Letter Types box, select the type of letter to add.

4. On the action bar, click **New Letter**. The New Letter screen appears.

5. From the menu bar, select **Letter**, **Classic View**. The New Letter screen appears in classic view.
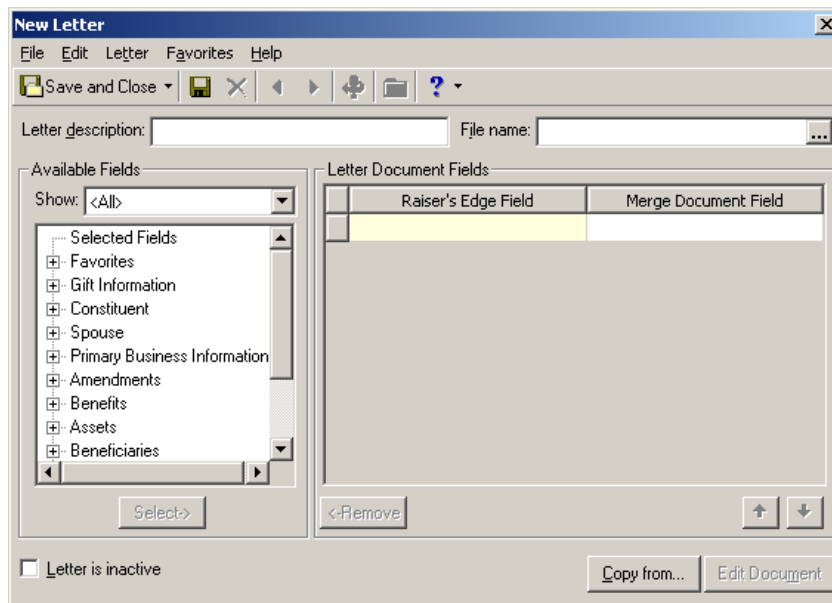
6. In the **Letter description** field, enter a description, of up to fifty characters, to help identify the letter. The description appears in the Letters grid on the right side of the main Letters page and in the list of entries for the **Letters** table. The **Letters** table contains all letter descriptions you can assign to an action, gift, event, or membership.

7. In the **File name** field, enter the file name for the letter, including the subdirectory and extension. To ensure you enter the correct path, or if you do not know where the letter is located, click the ellipsis to find the letter file. When you click this button, the File Location screen appears so you can navigate through your directories to find the document.

8. Under **Available Fields**, select the category of the fields to use in the **Show** field. The available fields for the selected category list in the tree view. To move a field into the **Raiser's Edge Field** column of the **Letter Documents Field** grid, select it under **Available Fields** and click **Select**.

9. In the **Merge Document Field** column, list each merge field defined in the letter beside its corresponding **Raiser's Edge Field**. When you actually merge the letter, *The Raiser's Edge* fields replace the merge fields in the letter.

Note: You can enter a letter with no merge fields, such as a handwritten letter or form letter, to track the recipients of the letter.

If you have *Microsoft Word*, when you enter a file name and path, *The Raiser's Edge* validates the data path and loads all the merge fields in the document into the **Merge Document Field** column. A message appears to inform you that either the document was not found; the document was found, but no merge fields were found; or the number of merge fields that were successfully loaded from the document.

Note: In the **File name** field, if you enter a document name with no file extension, the extension defaults to ".doc."

If you use another word processing program, manually enter the fields.

10. To remove a field from the **Raiser's Edge Field** column, select it and click **Remove**.

11. To ensure that a letter is not used in any further mailings, mark **Letter is inactive**. It remains in your database for historic purposes. If you mark the checkbox, the letter does not appear in the **Letters** table.

Note: If you use *Microsoft Word*, you can format the text for a merge field in the *Word* merge document.

12. When you click **Copy from**, the Copy From Existing Letter screen appears. You can select a letter and copy the information from it into the currently open letter. If the new letter has many of the same fields as an existing one, this can save time and promote consistency.

13. When you click **Edit Document**, the document path is validated and the program attempts to open the document using your word processor. This button is available only if you have *Microsoft Word* and enter a file name.

14. To save your entry, click **Save and Close** on the toolbar. You return to the Letters page.

Manage Letters

Note: To define how a constituent name appears on envelopes or letters, click the **Addressee/Salutations** link of *Configuration*.

On the Letters page of *Configuration*, you can edit existing letters, insert and sort letters in the grid, delete letters, find existing letters, and print a list of all your defined letters.

- "Insert a letter" on page 80
- "Delete a letter" on page 80
- "Print a list of your letters" on page 81
- "Find a letter" on page 81
- "Sort and move letters in the grid" on page 81

▸ **Insert a letter**

Note: When you create a letter using **New Entry**, the new letter appears at the bottom of the list.

When you insert a letter, you place the new letter above a selected entry in the list. If you are going to use the new letter frequently, you can place it on or near the top of the grid to speed your data entry. You can also sort and move existing letters in the grid. For more information, see "Sort and move letters in the grid" on page 81.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.
2. Click **Letters**. The Letters page appears.
3. In the Letter Types box, select the type of letter to insert.
4. In the list of letters, select the letter above which to place a new letter.
5. Click **Insert**. The New Letter screen appears. Follow the instructions to "Add a letter" on page 74. The new letter appears in the Letters page grid above the selected entry.

▸ **Delete a letter**

You can delete only letters that are not in use on any records in the program.

Scenario: You want to make changes to your General Thank You letter for gifts. Instead of editing the existing letter, you decide to delete it and replace it with a new one.

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.
2. Click **Letters**. The Letters page appears.
3. In the Letter Types box, select the type of letter to delete**Gifts**.
4. In the **Letter Description** column, select a letter**General Thank You**.

5. Click **Delete**. A verification message appears.

6. To delete the letter, click **Yes**.

   If the letter appears on a record, you cannot delete it. In this case, the General Thank You letter for gifts currently appears on many gift records. A message appears to inform you that you cannot delete the letter. To return to the letter, click **OK**. You can either edit the current General Thank You letter, or remove it from all records and then delete itYou return to the Letters page.

▸ **Print a list of your letters**

You can print a list of your letters, such as to keep a paper copy as a record for your files.

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

2. Click **Letters**. The Letters page appears.

3. In the Letter Types box, select the type of letter for which to print a list.

4. On the right side of the Letters page, right-click in the Letters grid and select **Print Letters Grid**. Your printer produces a list that contains the description and file location of every defined letter for the selected type.

▸ **Find a letter**

You can quickly and easily find a letter without scrolling through all your entries. This is especially useful if you define many different letters. Perhaps you need to find a particular letter for editing. To locate it quickly and easily, use the **Find** command.

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

2. Click **Letters**. The Letters page appears.

3. Click **Find** on the action bar. The Find screen appears.
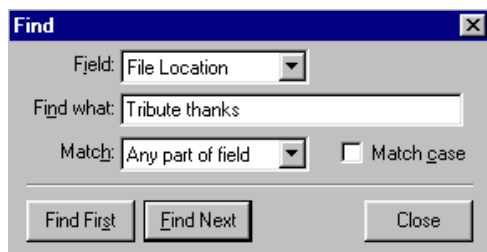
Note: You can use wildcard characters such as "?" and "*" in your searches as a substitute for part or all of your entry in the **Find what** field.

4. In the **Field** field, select whether to base your search on the letter description or file location.

5. In the **Find what** field, enter the name of the letter to find.

6. In the **Match** field, select whether you want your entry in the **Find what** field to match any part of the field, the whole field, or the start of field.

7. If you want your search to match any capitalization in the letter name, mark **Match case**.

8. To find the first match that meets your search criteria (in the order in which they list, not the first alphabetically), click **Find First**. When found, the letter is selected in the letters list on the Letters page.

9. To find any additional entries that meet the search criteria, click **Find Next**.

▸ **Sort and move letters in the grid**

Tip: You can use this procedure to place the most popular entries at the top of the Letters grid. This speeds data entry by saving time you spend scrolling through your less popular entries.

You can control the order your letters list in the grid. You can place your most frequently used letters at the top to speed data entry.

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

2. Click **Letters**. The Letters page appears.

3. In the Letter Types box, select the type of letter to sort.

4. On the action bar, click **Sort**. The Sort Letters screen appears.

5. In the **Sort Order** frame, specify the order in which to view the table.

   - To view the table to be in alphabetical order from A-Z, mark **Ascending**.

   - To view the table to be in reverse alphabetical order from Z-A, mark **Descending**.

6. Under **Sort By**, specify whether to sort the table by description or file location.

7. To move a selected entry up or down one line in the Letters grid, use the up and down arrows.

International

> **Note**: Not to be confused with addressee/salutation settings, your selections on the **International** link determine how the address block is formatted for different countries.

With the **International** link, you can track information such as the different types of currency you accept and the standard address formats for different countries. When you define different countries, you can enter donations from, and define address formats for, constituents who live in countries other than your own.

Define currency exchange rates so when you enter gifts, *The Raiser's Edge* calculates an amount in your country's default currency. When you print mailing addresses, the settings you establish on this screen determine the constituent information format.

Want to know about "Establish International Settings" on page 82? About "Manage International Settings" on page 84?

Establish International Settings

You can add new countries to the program and include currency and address block format information. To update exchange rates and change other information, you can edit information for countries already entered in the program. You can delete a country from your records or print the information for a country to keep as a record for your files.

To help identify a country, you can select its name as used by the International Organization for Standardization (ISO). If you use *Blackbaud Merchant Services* to authorize and process credit card transactions, or integrate with *Blackbaud NetCommunity* and use a Payment Part 2.0 or Event Registrations on your website, you must select an ISO name for each country from which you receive transactions. For information about ISO country names, visit https://www.iso.org/obp/ui/#iso:pub:PUB500001:en.

▶ **Add a country**

You can add a country and define currency and address format information for it.

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

2. Click **International**. The International page appears.
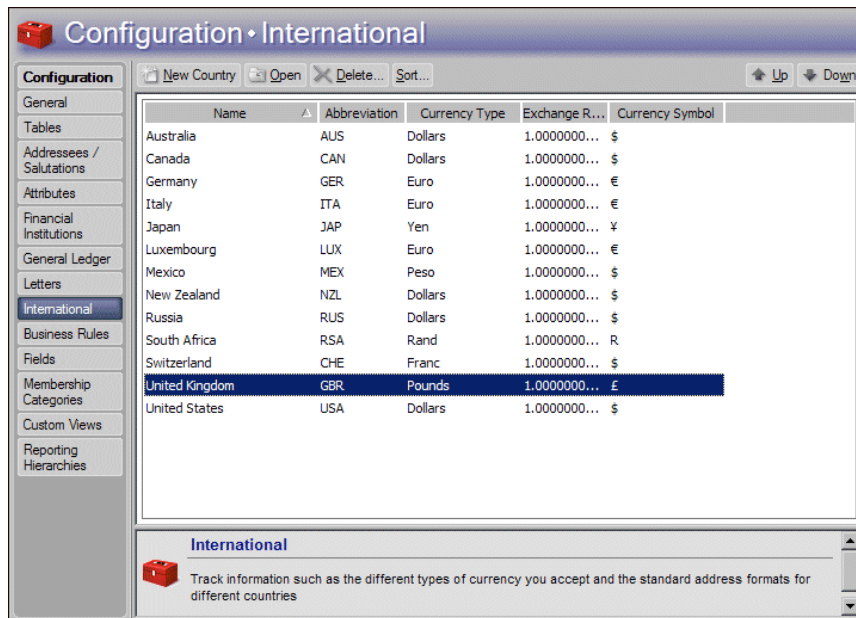
The grid displays information for countries already entered in the program.

3. On the action bar, click **New Country**. The New Country screen appears.

Note: When you select a country, the symbol and placement automatically default to the settings established in the International option of the *Windows* Control Panel.

4. In the **Name** field, select or enter the name of the new country. The dropdown list includes all the countries for which you can establish Regional Settings in your *Windows* Control Panel.

5. In the **Abbreviation** field, enter the abbreviation to use for the country, such as in the address block for mailing purposes. For example, you can use USA in place of United States of America.

6. To help further identify the country, in the **ISO Name** field, select the name of the country according to the International Organization for Standardization (ISO).

    If you use *Blackbaud Merchant Services* to process credit card transactions or integrate with ***Blackbaud NetCommunity*** and use the Payment Part 2.0, you must select an ISO name.

7. In the **Currency** field, select the type of currency used in this country.

8. In the **Exchange rate** field, enter the exchange rate for currency with this country.

Note: To add a currency symbol that is not available on your keyboard, click **Start** on the *Windows* taskbar and select **Programs**, **Accessories**, **Character Map**. Select the symbol to use and click **Copy**. On the New Country screen, place the cursor in the **Symbol** field and press CTRL + V to enter the symbol.

9. In the **Symbol** field, enter the appropriate symbol for the currency type.

10. In the **Placement** field, select where to place the currency symbol.

11. In the **1000 separator** field, determine which character to place after the thousands placeholder, such as the comma in "1,000".

12. In the **Decimal separator** field, enter the character to use as a decimal, such as to separate dollars from cents in "$10.00".

13. In the **Decimal digits** field, enter how many digits to appear after the decimal separator in a number. For example, to format ten dollars as $10.00, enter "2".

14. For **Leading zero**, select whether to place a zero before the decimal separator on numbers less than one. For example, your selection determines whether 50 cents appears as $0.50 or $.50.

15. If you use *AddressAccelerator*, the **Addresses with this country are eligible for AddressAccelerator** checkbox appears. By default, this checkbox is marked for only the United States. When you mark this checkbox, *AddressAccelerator* may validate addresses for the country. To validate addresses in a country, you must first obtain the *AddressAccelerator* version for the country. You can only have one set of *AddressAccelerator* data files at a time.

    If, in *Configuration*, you set a business rule to automatically validate any address you edit, *AddressAccelerator* validates only addresses in countries with this checkbox marked. For information about this business rule, see "Define general rules" on page 87.

16. In the **Display available fields for this country** field, select the country with the address block style most similar to the new country.

17. Use the left and right arrows to move fields to or from the **Address block** box. You selections in this box determine how the address for the new country appears. You can select any field from the **Available fields** box for the address format of the new country.

18. To add punctuation, line breaks, or spaces to the address format in the **Address block** box, use the buttons at the bottom of the screen.

19. To save the new country, click **Save and Close** on the toolbar. You return to the International page.

Manage International Settings

You can edit and delete countries. You can print information for countries to keep as a reference.

- "Edit a country" on page 85
- "Delete a country" on page 85
- "Print international information" on page 86

▶ **Edit a country**

You can edit the information for a country you have already entered in the program. In this procedure, we will update the exchange rate for the United Kingdom.

Scenario: You need to update the exchange rate for the United Kingdom. You currently have the rate entered at 1.00 and you want to enter a more accurate figure.

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

2. Click **International**. The International page appears.

3. In the grid, select United Kingdom and click **Open**. The United Kingdom screen appears.

4. In the **Exchange rate** field, enter the updated exchange information.

5. To save the changes, click **Save and Close** on the toolbar. You return to the International page.

▶ **Delete a country**

Occasionally, you may need to remove a country from the program. For example, if you end appeal mailings to a country in which no constituents live, you can remove it from your database.

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

2. Click **International**. The International page appears.

3. In the grid, select the country to delete.

4. On the action bar, click **Delete**. A verification message appears.

5. To delete the country, click **Yes**.

▶ **Print international information**

You can print a list of all defined countries or a detailed profile of each country to keep for your records.

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

2. Click **International**. The International page appears.

3. To print a list of all the countries in the grid, right-click in the grid and select **Print**, **Grid only**.

   To print a detailed profile for a country, including address format and currency exchange information, select the country in the grid to print, right-click, and select **Print**, **Country Profile**.

Business Rules

Business rules help speed your data entry and help to verify that the data is correct. You can perform common tasks in two categories: those with predefined rules and those with rules that you define. Predefined rules are for the most part set up by marking a series of checkboxes and options. They govern a wide variety of functions such as rules for adding gifts and what constitutes duplicate criteria during searches.

Note: Business rules affect virtually all areas of the program including **Batch**, **Import**, and **Global Change**. However, you can override business rules for individual imports. For more information, see the *Import Guide*. Business rules also affect inactive constituents.

You can create customized rules for three events: to open constituents, add gifts, and add actions. When you specify a query and define a message to appear, when you execute one of the three events and the record falls within the query, the message defined for that rule appears. For example, you can run a query to include all your board members. You can then use the query to create a rule that a message appear to advise extreme care any time one of your users opens a board member's constituent record.

Business rules take effect as soon as you set them. Once you mark an option or checkbox or save a user-defined rule, the rule is in effect.

The types of business rules are:

- "General Rules" on page 87
- "Duplicate Rules" on page 88
- "Name Display Rules" on page 91
- "Generate IDs Rules" on page 93
- "Batch Rules" on page 94
- "Merchant Account Rules" on page 96
- "Gift Rules" on page 100
- "Constituent Rules" on page 105
- "Email Rules" on page 111
- "Mail Options" on page 113
- "Alumni Rules" on page 114
- "Membership Rules" on page 116
- "Event Rules" on page 120
- "Queue Rules" on page 121
- "User Defined Rules" on page 122
- "System Access Options" on page 130

General Rules

General rules control how the program treats invalid credit card numbers and determine functions from which deceased constituents are excluded. If you have *AddressAccelerator*, you can also specify that the service attempt to validate addresses whenever you edit them, and select additional address formatting options.

▶ **Define general rules**

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

2. Click **Business Rules**. The Business Rules page appears.
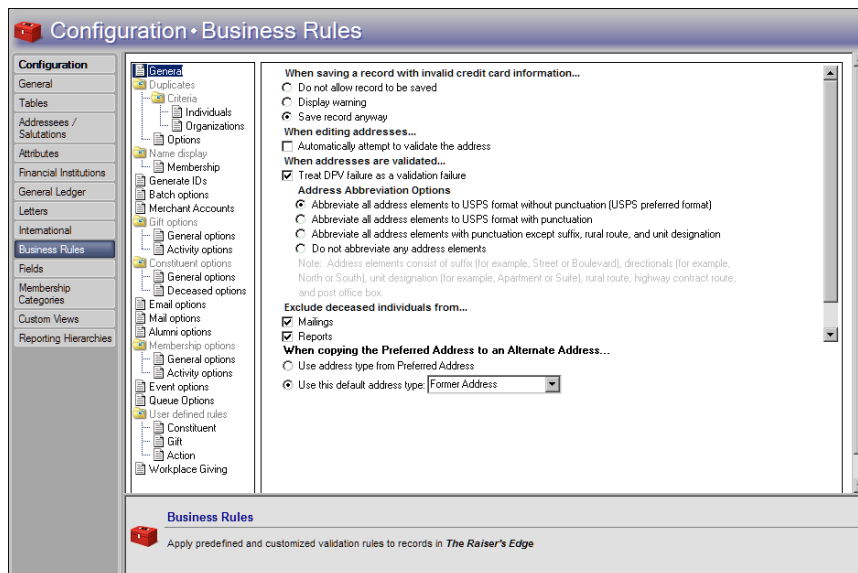
The tree view lists all business rule options. When you select an option, the rule choices for that option appear on the right. If you select a folder, the rule choices for the first option under that folder display on the right. The default opening option in the tree view is **General**.

Note: 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.

3. Under **When saving a record with invalid credit card information**, select the default option for what to do when users attempt to save a record that contains an invalid credit card number or expiration date. *The Raiser's Edge* does not check the availability of credit in an account. The program uses a formula to ensure the validity of the credit card number based on several factors, including the prefix (first several digits) and number of digits in the account number. If no credit card type is specified on the record, *The Raiser's Edge* tries to determine the type based on the prefix and number of digits, and processes the number as the assumed credit type.

   • If you select **Do not allow record to be saved**, users cannot save invalid credit card information. If users attempt to do so, a warning appears.

Note: Remember, business rules affect all users of the program. For settings that affect individual users, see the "User Options" chapter of the *Program Basics Guide*.

   • If you select **Display warning**, the program displays a warning and allows the user to edit the entered credit card information.

   • If you select **Save record anyway,** the program saves the invalid information without a warning.

4. If you use the *AddressAccelerator* mailing service, the **Automatically attempt to validate the address** checkbox appears. To see whether an address meets *AddressAccelerator* standards whenever you edit an address, mark this checkbox.

   Only addresses in countries for which you have marked the **Addresses with this country are available for address validation** checkbox are included. For more information about this checkbox, see "Add a country" on page 82.

5. If you use the *AddressAccelerator* mailing service, the **When addresses are validated** options appear. Select whether to treat a Delivery Point Validation (DPV) failure as a validation failure and how to abbreviate elements in addresses. By default, the program abbreviates all addresses to the preferred format of the USPS.

Note: If you have NCOA processing, we recommend you run the addresses updated via NCOA through the address validation process to put the NCOA addresses in your preferred format.

   If you select any option other than **Abbreviate all address elements to USPS format without punctuation (USPS preferred format)**, you can still get the USPS preferred format when you use the optional module *PostalSaver* and mark **Cass certify addresses (this option will not update addresses in the database)** on the PostalSaver tab of a mailing. For mailings that meet postal discount requirements, this option converts the addresses to the USPS preferred format for that mailing only — it does not update the addresses in the database.

6. Under **Exclude deceased individuals from**, to increase accuracy and efficiency and avoid potentially uncomfortable situations, select whether to exclude records marked as "Deceased" from mailings, reports, or exports. These settings are only defaults. You can change them in the specific area of the program.

7. Under **When copying the Preferred Address to an Alternate Address**, select the type of address to use when user select the **Copy Preferred to Alternate** menu item on a constituent record. When users select this menu item on the Bio or Org 1 tab of a constituent record, the program copies the preferred address as an alternate address so you can select, or create, another address to use as the preferred address. All records linked to the old preferred address (now an alternate) update to the new preferred address. This business rule determines the type of address the alternate is saved as.

   • To use the same address type the alternate address had when it was the preferred address, select **Use address type from Preferred address**.

   • To specify an address type, select **Use this default address type** and select the type in the accompanying field. The default entry is "Home".

   When you leave this page, the program automatically saves your changes.

Duplicate Rules

Duplicate searches in *Records* are used to determine whether a new or edited entry already has a record. On this screen, you can define the rules the program uses to determine when to search for duplicate records. Select your own rules, or use the defaults. For example, if you use the default settings, a duplicate search is conducted when you edit the constituent name, spouse name, relation name, or parent company name of a constituent record.

When the program performs a duplicate search, it uses a duplicate algorithm that automatically checks name, address, phone number, and email address to determine duplicate records.

▶ **Define duplicate rules for searches**

   In addition to searches for duplicate individual records, the program uses this criteria in Duplicate Constituent Reports, and when you import records.

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

   2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, select **Duplicates**. The duplicate criteria grid appears.
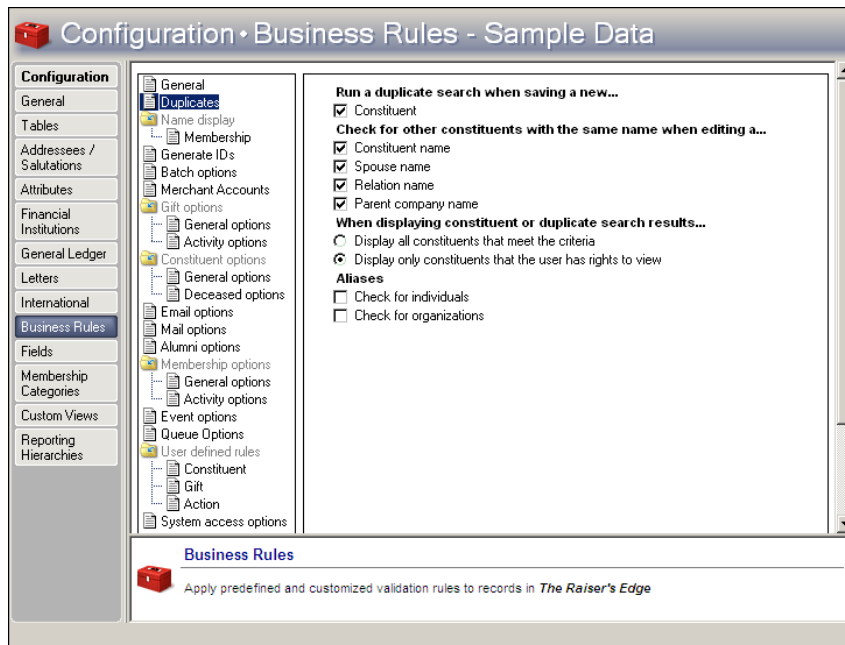
Note: During a duplicate search, the program checks all address components against the constituent's primary address.

4. To run a duplicate search when users save a new constituent record, select **Constituent**. The program searches the constituent record only when you first add it, not if you subsequently edit it. When the program finds duplicates, it displays them in a list.

5. Under **Check for other constituents with the same name when editing a**, select the types of name to search for the same name when you edit a record. You can select to search existing constituent records for the constituent name; spouse name; relation's first, middle, or last name; or parent company organization name. When you select these checkboxes, you avoid the creation of a duplicate record when you edit and save current records. This rule applies only when you save current records after an edit, not when you create new ones. If duplicates are found, they appear in a list. You can save the record as it is or return to the record without saving it.

Note: If you have a lot of records, running a duplicate search every time you create or edit a record may take too long to suit your purposes. Instead, you may want to run a Duplicate Constituent Report in *Administration* at set intervals rather than use these business rules.

6. Under **When displaying constituent or duplicate search results...** select whether or not users should be able to see all records that meet duplicate criteria, or only the constituents that user has rights to view.

   For information on how to assign user view rights for constituents, see the "Security" chapter of this book.

7. Under **Aliases**, select to check aliases for individuals, organizations, or both. If you do not select either checkbox, aliases will not be included in the duplicate check.

Note: Security rights can limit the constituents who appear in a duplicate search.

   When you leave this page, your changes are automatically saved.

Duplicate Constituents Report

After you define duplicate rules in *Configuration*, you can run a duplicate constituents report in *Administration*. To keep your database from filling up with duplicate records, *The Raiser's Edge* can compare records in your database — individual and organization — and find all duplicates. You can then use other *Administration* links, such as **Merge Constituents** and **Global Delete**, to help rid the database of any duplicate records. The **Duplicate Constituents** link determines duplicates based on the rules established under **Business Rules** in *Configuration*.

▶ **Search for duplicate constituents**

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

2. Click **Duplicate Constituents**. The Duplicate Constituent Report screen appears.

3. Select whether you would like to see individuals or organizations in your results.

4. Select whether or not you would like to create a static output query of the duplicate records found after the search completes.

5. Click **Run Report Now**. The duplicate search begins. A screen appears to track the process.

    If you selected to create an output query, the Save Static Query screen appears.

    a. Enter a name and description to help identify the query of duplicate records. The **Query format** field defaults to Static and cannot be changed. You can also specify whether to allow others to execute or modify your query.

    b. In the **Create in** field, select the query category in which your static output query will be saved. You can click **New Category** to create a new category if necessary.

    c. Click **Save**.

When the process is complete, if the program finds no duplicates, a message appears to inform you that "No records meet specified criteria." If the program discovers any duplicate records, the Duplicate Constituent Report appears and displays information about the records.

6. To print the report, click the print icon on the toolbar.

7. To close the report, click the X in the upper left corner. You return to the Duplicate Constituent Report screen.

Name Display Rules

If you have the optional module *Membership Management*, Name display rules appear. These rules determine defaults for how names display for memberships.

▸ **Define default membership name display rules**

Select the default for how a name appears in the **Name on card** field on a membership record.

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, under **Name display**, select **Membership**. The membership name display rule options appear.

Note: If the program finds no selected addressee/salutation, it uses Key name (First name, Middle name, and Last name).

4. Under **Default Membership Card Addressee/Salutation**, select a display option for the default addressee/salutation of the member. Your selection determines how the name of the member appears on the membership card.

   • To select an addressee/salutation from the individual record, select **Use addressee from Member** and select your entry in the **Use this addressee if present on the Individual** field. In the **Otherwise use** field (which contains the additional choices of Name and Constituent ID), select the entry for the program to use as a backup if it cannot find the first addressee/salutation format. If the program finds no addressee/salutation, it uses the Key name (First name, Middle name, and Last name).

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

   • To select any defined addressee/salutation plus any embedded addressee/salutations in the program, select **Use addressee from Configuration**. If you select an embedded addressee/salutation (Const Addr/Sal), select entries in the **Use this address if present on the Individual** and **Otherwise use** fields. To learn more about embedded addressee/salutations, see "Add an addressee/salutation" on page 45.

   • To use the name from the membership record, select **Use Member name**. The **Use this address if present on the Individual** and **Otherwise use** fields are disabled.

5. Under **Membership Given by Addressee/Salutation**, select a display option for the default addressee/salutation for the individual who gives the gift of membership. Your selection determines how the name of the person giving the membership appears on the membership record. The options are the same as those for membership cards.

   When you leave this page, the program automatically saves your changes.

Generate IDs Rules

> **Note**: Automatic IDs are sequential and unique. They can be generated in numeric form only.

You can specify rules to generate automatic ID numbers for several record types. The program assigns automatic IDs for record types in the order the records are added. Auto IDs are sequential and unique. They can be generated in numeric form only. You can use these IDs to streamline your data retrieval in queries and searches.

▶ **Define defaults rules for generating IDs**

You can set defaults to establish the record types for which you generate IDs, and how the IDs are numbered.

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, select **Generate IDs**. The rule options for generating IDs appear.
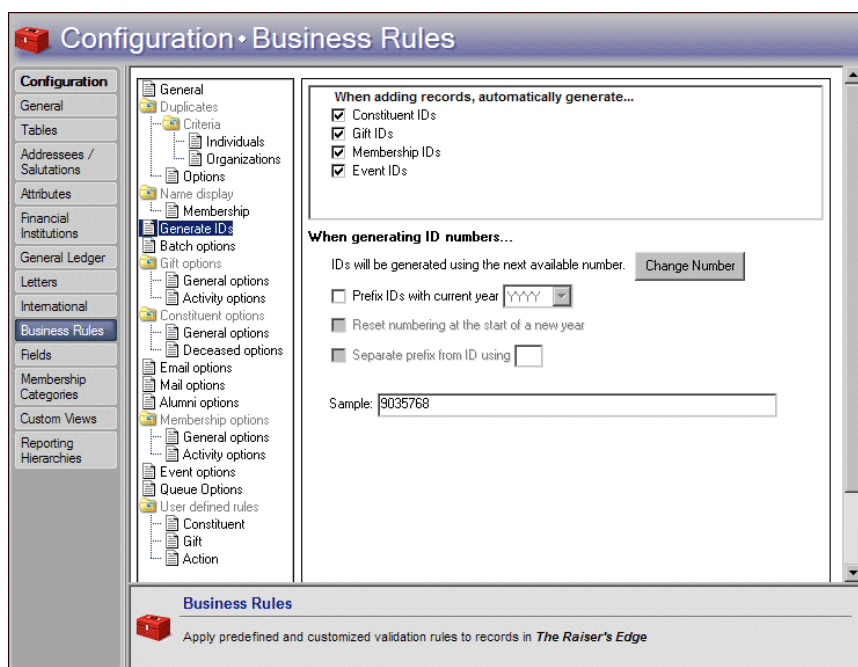
4. Under **When adding records, automatically generate**, select the IDs to automatically generate when you add a record. To generate an ID, mark its checkbox. You can automatically generate **Constituent IDs**, **Gift IDs**, **Membership IDs**, (if you have the optional module *Membership Management*), and **Event IDs** (if you have the optional module *Event Management*).

5. To generate ID numbers, the program searches for the lowest available number that occurs after the ID number listed under **When generating ID numbers**. To find and change the reference number the program uses to find a unique ID number:

a. Click **Change Number**. The Change Next Available ID Number screen appears.

b. In the **Next Available ID** column, the program displays the number last used to generate an ID, plus one. To start with another number when the program searches for the next unused ID number when you add a record type, enter it here.

   When you place the cursor in the **Next Available ID** field for a record type, a button in the field is enabled. When you click the button, the program starts at zero and searches for the next unused ID number available for that record type. You can use this button to ensure you have no gaps in your ID numbering.

c. Click **OK**. You return to the rule options for generating IDs.

Note: If you mark **Prefix with current year**, you can reset your IDs to begin renumbering at the start of a new year.

6. When you mark a record type, the **Prefix IDs with current year** checkbox is enabled. To display the year before the ID number, mark this checkbox and enter whether you want the year to appear as two or four characters. Placing the year before the ID number lets you identify at a glance the year the record was added. When you mark this checkbox, you affect all record types.

Warning: Be careful when you use prefix numbers with a year. If you decide not to use the prefix during the year and change the option, when the program searches for the next available number, it does not take into account numbers already entered with the prefix. For example, if you entered IDs prefixed with 2000 and then change the option to include no prefix, the program will show the next available ID number as "1".

7. When you mark **Prefix IDs with current year**, the **Reset numbering at the start of a new year** and **Separate prefix from ID using** checkboxes are enabled.

   • To begin with number 1 when creating IDs in a new year, mark **Reset numbering at the start of a new year**.

   • To separate the year from the ID number, mark **Separate prefix from ID using** and enter the symbol you want to use in the corresponding field. For example, if you enter a forward slash in this field and select the year to display as four characters, the program formats the constituent ID as "2001/762."

   In the **Sample** field, an example of the ID options you select appears.

   When you leave this page, the program automatically saves your changes.

Batch Rules

You can establish rules to control how the program generates batch numbers and warnings to display when gifts are added to batches.

▶ **Define batch rules**

You can set rules for the generation of batch ID numbers and select a warning to appear when you add gifts to a batch from constituents with outstanding balances.

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, select **Batch options**. The business rules for batch options appear.
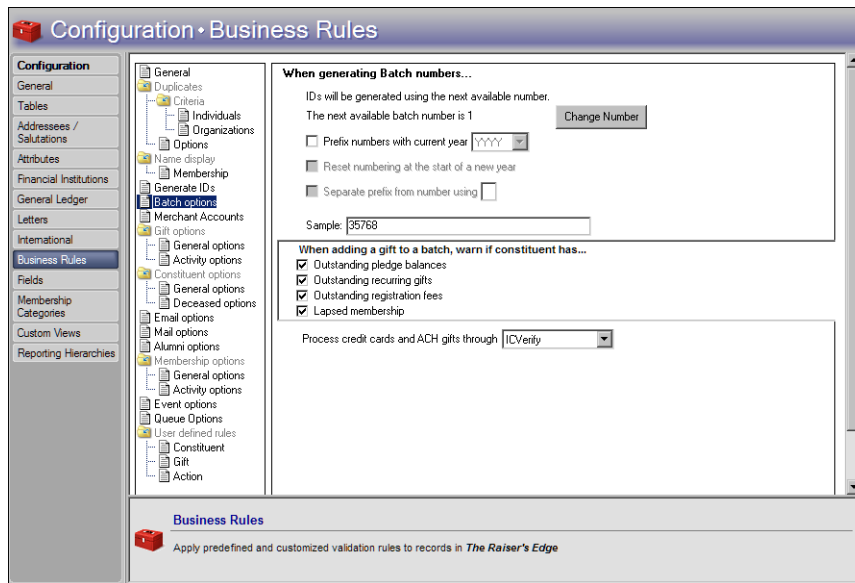
Note: When you begin to create batches, the program does not update the next available batch number listed under **When generating Batch numbers**. The program uses this number as a reference point to begin a search for the next unused batch number.

4. To generate batch numbers, the program searches for the lowest available number that occurs after the batch number listed under **When generating Batch numbers**. To find and change the reference number the program uses to find a unique batch number:

   a. Click **Change Number**. The Change Next Available Batch Number screen appears.
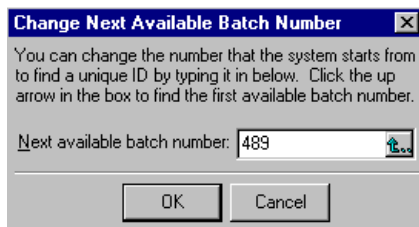
   b. In the **Next available batch number** field, enter the number you want the program to use when it begins to search for the next unique batch number. If you click the button in the **Next available batch number** field, the program searches for the next unique batch number available.

   c. Click **OK**. You return to the Business Rules page for batch options.

5. To display the year the batch was created before the batch number, mark **Prefix numbers with current year** and select whether to display the year in two or four characters in the corresponding field. When you add a year prefix to your ID numbers, you can identify at a glance the year a batch was created.

> **Warning**: Batch ID numbers must be unique, so before you can mark **Reset numbering at the start of a new year**, you must mark **Prefix numbers with current year**.

When you mark **Prefix numbers with current year**, the **Reset numbering at the start of a new year** and **Separate prefix from ID using** checkboxes are enabled.

- To reset the next available batch number to "1" for the first batch created in each calendar year, mark **Reset numbering at the start of a new year**.

- To use a symbol to separate the year from the batch number, mark **Separate prefix from ID using** and enter the symbol to use. For example, if you enter a hyphen in this field, the program formats the batch number as "2000-489."

The **Sample** field displays an example of the batch number with the format options selected.

6. Under **When adding a gift to a batch, warn if constituent has**, select when to display a warning when you add gifts to a batch. You can mark checkboxes to warn if a constituent has outstanding pledge balances or recurring gifts. If you use the optional module *Event Management*, you can mark a checkbox to warn if the constituent has outstanding registration fees. If you use the optional module *Membership Management*, you can mark a checkbox to warn if the constituent has a lapsed membership.

   For example, if you mark **Outstanding pledge balances** and a user adds a gift with an outstanding pledge to a batch, a warning message appears. If more than one of the conditions are present, multiple messages appear.

7. In the **Process credit cards and ACH gifts through** field, select the payment processor gateway you use to process credit card and direct debit transactions. You can select ICVerify or IATS/Other.

   - If you select ICVerify, select **Tools**, **User Options** from the menu bar. On the Options screen, select the File Locations tab and enter the location for the "ICVerify Data Path".

   - If you select IATS/Other, the **Click here to set up merchant accounts** link appears. To set up and manage your merchant accounts, click the link. The Business Rules page for merchant accounts appears. For information about these business rules, see "Merchant Account Rules" on page 96.

   When you leave this page, the program automatically saves your changes.

Merchant Account Rules

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

If, in the **Process credit cards and ACH gifts through** field under **Batch options**, you select IATS/Other, you must enter information for at least one merchant account for an authorization service such as *Blackbaud Merchant Services* or IATS. To set up a merchant account, select **Merchant Accounts** on the **Business Rules** tree view.

To process payments through *ICVerify*, you must select ICVerify in the **Process credit cards and ACH gifts through** field under **Batch options** and enter the *ICVerify* data path. For more information, see "Batch Rules" on page 94.
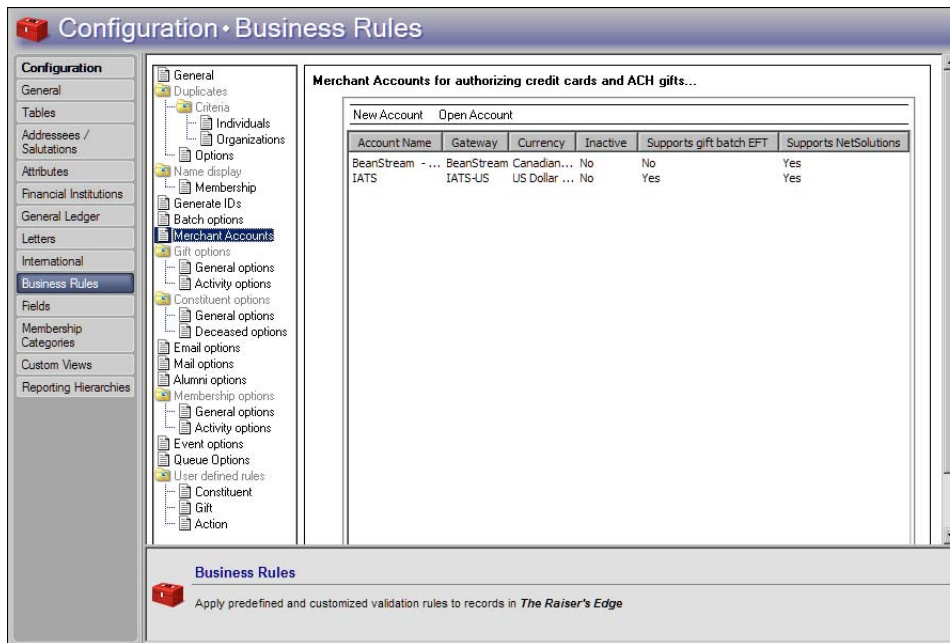
Note: You cannot delete merchant accounts from ***The Raiser's Edge***. To prevent the use of a merchant account, we recommend you edit the merchant account and mark **Inactive**.

In the **Merchant Accounts for authorizing credit cards and ACH gifts** grid, the merchant accounts your organization uses with the *Blackbaud Payment Service* appear. For each merchant account, you can view the name of the merchant account, the gateway and currency you use with the account, and whether the merchant account is inactive. You can also view whether the merchant account supports batch electronic funds transfer (EFT) and ***NetSolutions***. From the grid, you can set up and edit the merchant accounts to which transactions are directed when you process payments.

• "Add a merchant account for a credit card authorization service" on page 97

• "Edit a merchant account" on page 99

▶ **Add a merchant account for a credit card authorization service**

You can set up a merchant account and provide the login credentials received from the authorization service. ***The Raiser's Edge*** uses this information to process payments with the merchant account through the *Blackbaud Payment Service*.

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, select **Merchant Accounts**. The merchant accounts for your organization appear.

4. On the action bar of the grid, click **New Account**. The Add Merchant Account screen appears.

5. Enter a name and description to help identify the merchant account.

6. When your organization sets up an account with the authorization service, you receive a login ID and password for the account. In the **Login ID** and **Password** fields, enter the login credentials provided by the service for the merchant account. Regardless of the characters you enter in the **Password** field, only asterisks appear.

7. In the **Confirm password** field, enter the password again. Regardless of the characters you enter in this field, only asterisks appear.

8. In the **Gateway** field, select the authorization service to use to process transactions with the merchant account.

9. In the **Currency** field, select the currency to use with the merchant account and selected gateway.

Note: The Address Verification Service (AVS) is fraud protection that verifies customer billing addresses submitted through online payment transactions. With AVS, the gateway issues a transaction to authorize the payment. In response, the gateway receives information about the payment, including whether the street address and ZIP Code are correct. Depending on the AVS level selected for the merchant account, the gateway uses this information to determine whether to accept the payment. The program performs this service only when the selected gateway supports AVS for the country of the transaction. For information about AVS support, contact your gateway.

10. If the selected service provides the Address Verification Service (AVS) as fraud protection to verify customer billing addresses submitted through online payment transactions, the **AVS level** field is enabled. In the **AVS Level** field, select whether to use AVS with the merchant account and at what level.

   • To perform no address verification, select "None".

   • To accept transactions only when both the street address and ZIP Code match, select "Full."

   • To accept transactions when either the street address or ZIP Code match, select "Medium." We recommend you select this option.

   • To deny transactions only when neither the street address nor the ZIP Code match, select "Light." This level may accept transactions when either the street address or ZIP Code returns no response, regardless of whether the other criteria matches.

Note: The Card Security Code (CSC) appears only on the credit card itself, and not on receipts or statements.

11. If the selected service provides a Card Security Code (CSC) check as fraud protection to verify the card security code, called the Card Verification Value (CVV2), the **CSC level** field is enabled. In the **CSC Level** field, select whether to use CSC checks with the merchant account and at what level.

   • To perform no CSC check, select "None".

   • To accept transactions only when the CSC matches, select "Full".

   • To decline transactions only when the CSC does not match, select "Light".

12. In the **Process mode** field, select the mode in which to use the merchant account with the selected service. You can select "Live" or "Demo". If the selected service supports a test mode, you can also select "Test".

13. To set up the merchant account but not make it available for use, mark **Inactive**.

14. In the card grid, the payment cards the selected service supports appears. In the **Enable** column, mark the checkboxes for the credit cards to use with the merchant account.

15. If the selected service requires additional fields, the field grid is enabled. In the grid, enter the information necessary to process transactions through the service.

16. Click **OK**. *The Raiser's Edge* sends the merchant account information to the *Blackbaud Payment Service* for secure storage. You return to the Business Rules page. In the **Merchant Accounts for authorizing credit cards and ACH gifts** grid, the new merchant account appears.

▶ **Edit a merchant account**

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, select **Merchant Accounts**. The merchant accounts for your organization appear.

4. On the action bar of the grid, click **Open Account**. The Edit Merchant Account screen appears and displays the merchant account information retrieved from the *Blackbaud Payment Service*.

5. Update the information as necessary.

6. Click **OK**. *The Raiser's Edge* sends the merchant account information to the *Blackbaud Payment Service* for secure storage. You return to the Business Rules page.

Gift Rules

You can set rules to control many aspects of gift entry including who soft credits default to and defaults for saving gifts. Your selections affect how gifts display on reports and in mailings.

- "Gift General Options" on page 100
- "Gift Activity Options" on page 101

Gift General Options

Define rules to determine who is credited for matching gifts, who is soft credited on reports and in mailings, queries, and exports, and how to display the word gift.

▶ **Define general defaults for gifts**

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, under **Gift options**, select **General options**. The general gift rule options appear.
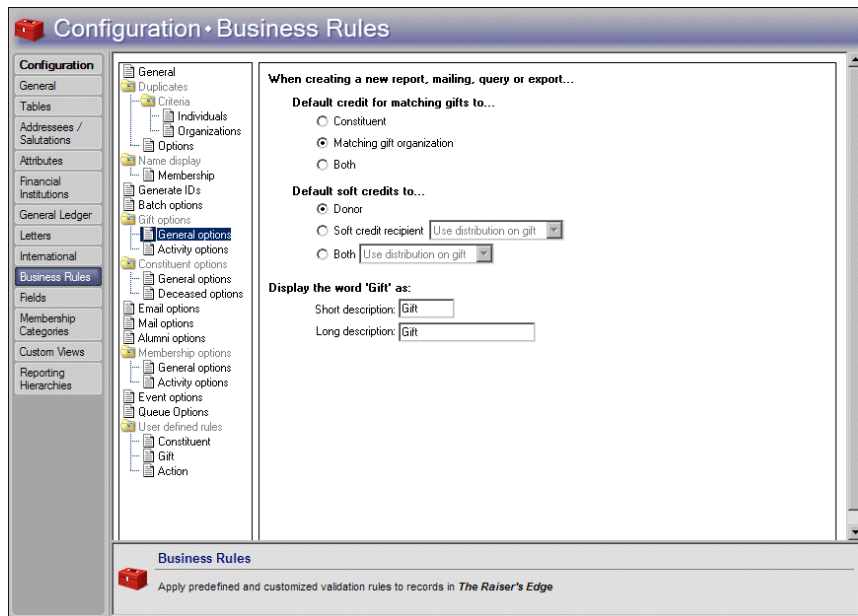
4. Under **Default credit for matching gifts to**, select who to default the matching gift credit for reports, mailings, queries and exports. Your selection is only a default. You can change it on individual reports, mailings, queries, and exports.

   - To default the matching gift credit to the giver of the primary gift, select **Constituent**.

   - To default the matching gift credit to the matching gift company defined on the constituent record, select **Matching gift organization**.

   - To default the matching gift credit to the giver of the primary gift and the matching gift company defined on the constituent record, select **Both**.

Note: For more information about matching gifts and soft credits, see the *Gift Records Guide.*

5. Under **Default soft credits to**, select who to default soft credits on reports, mailings, queries, and exports. You can select to default soft credits to the **Donor**, **Soft credit recipient**, or **Both**. Your selections for soft credits are only defaults. You can change these defaults on individual reports, mailings, queries, and exports.

If you select **Soft credit recipient** or **Both**, select how to distribute the soft credit among the recipients.

- On the Soft Credit tab of the gift record, you can distribute a gift among multiple recipients. For example, you can credit one recipient with thirty percent of a gift and another with fifty percent (the distribution does not have to equal 100 percent). To use this distribution for soft credits on reports and mailings, select "Use distribution on gift".

- To distribute the gift evenly between recipients, select "Split evenly". For example, a $600 gift split among three recipients would credit each with $200.

- To credit all recipients with the full amount, select "Full amount to all".

Warning: When you rename the word "gift," the change affects many areas of the program. To ensure consistency and accuracy, be careful to not duplicate terms already used in *The Raiser's Edge*.

6. Under **Display the word 'Gift' as**, enter the short and long description of how you want the word "gift" to appear in the program. If your organization does not use the term "gift," enter the correct term to reflect your business needs. The maximum character length for the short description is four. The maximum character length for the long description is 25. Neither the short or long description can contain periods [.] or ampersands [&]. For example, if your organization uses the word transaction, you would enter "trns" in the **Short description** field and "transaction" in the **Long description** field.

The name entered appears most places in the program where the term "gift" currently appears.

When you leave this page, the program automatically saves your changes.

Gift Activity Options

You can establish rules for warnings to appear when users add new gifts and change gift and receipt amounts. You can also establish rules to soft credit matching gift pledges, link matching gifts to proposals, matching gift and receipt amounts, and minimum gift amounts users can save.

- "Define rules for adding and updating gifts" on page 101
- "Define rules for saving gifts" on page 103
- "Define rules for integration with GiftWrap" on page 104

▶ **Define rules for adding and updating gifts**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.
2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, under **Gift options**, select **Activity options**. The gift activity rule options appear.
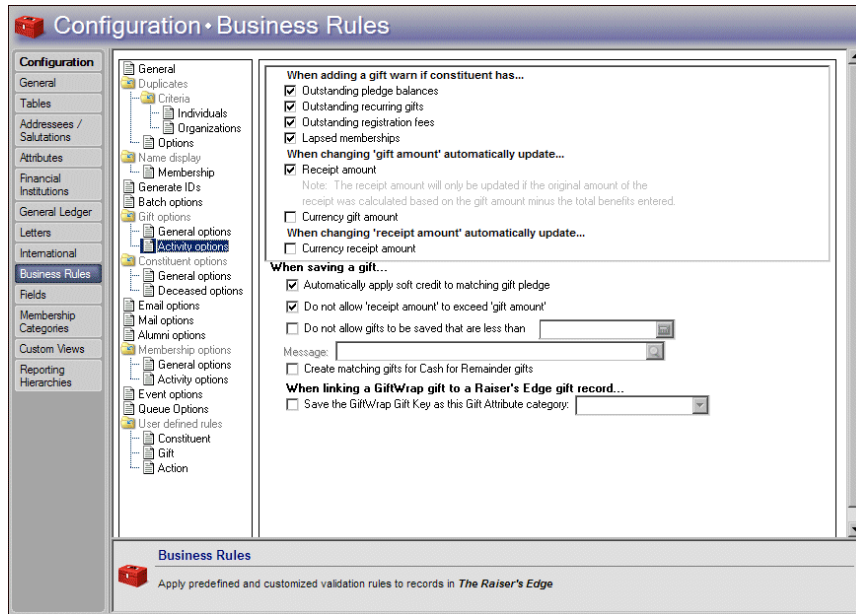
4. Under **When adding a gift warn if constituent has**, specify when to display a warning when users enter gifts. You can mark checkboxes to warn if a constituent has **Outstanding pledge balances**, **Outstanding recurring gifts**, **Outstanding registration fees** (*Event Management* only), or **Lapsed memberships** (*Membership Management* only).

If any of these situations exists, a warning message appears to ask whether to apply the new gift toward the outstanding pledge balance, recurring gift, registration fee, or membership renewal. If more than one of these situations is present, separate message boxes appear for each.

Note: If you do not set this rule, when the gift amount is originally entered, the receipt amount defaults to the same amount as the gift.

5. Under **When changing 'gift amount' automatically update**, specify whether to update the receipt amount. When you mark **Receipt amount**, the receipt amount is updated only if, before the change, it equals the gift amount minus the value of all benefits. For example, if a gift of $20.00 was given and a $10.00 t-shirt was a benefit, the receipt is for $10.00. If you change the gift amount to $50.00, the receipt amount changes to $40.00. Or, if a gift of $100 has no benefits and a receipt value of $100 (the receipt amount still equals the gift amount minus the benefit value), and you change the gift amount to $150, the receipt amount automatically updates to $150.

However, if a receipt amount is different from the gift amount minus the value of all benefits, the receipt amount does not automatically update if you later change the gift amount. For example, if you have a gift of $100 with no benefits that you assign a receipt value of $75, and you change the gift amount to $150, the receipt amount remains $75.

6. To update the currency gift amount to reflect the new gift amount, mark **Currency gift amount**. To determine the currency gift amount, the program multiplies the gift amount by the currency exchange factor as entered for a country in the **International** link of *Configuration*. When you mark these checkboxes, figures already in the **Receipt amount** and **Currency gift amount** fields automatically update when you change the gift amount.

7. Under **When changing 'receipt amount' automatically update**, specify whether to update the currency receipt amount. When you mark **Currency receipt amount**, you ensure the relationship between the receipt amount and currency receipt amount remains the same. The value in the **Currency receipt amount** field is the receipt amount times the currency exchange factor. The currency receipt amount updates as soon as you leave the **Receipt amount** field. When you mark **Currency receipt amount**, figures already in the **Currency receipt amount** field automatically update when you change the receipt amount.

When you leave this page, the program automatically saves your changes.

▶ **Define rules for saving gifts**

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, under **Gift options**, select **Activity options**. The gift activity rule options appear.
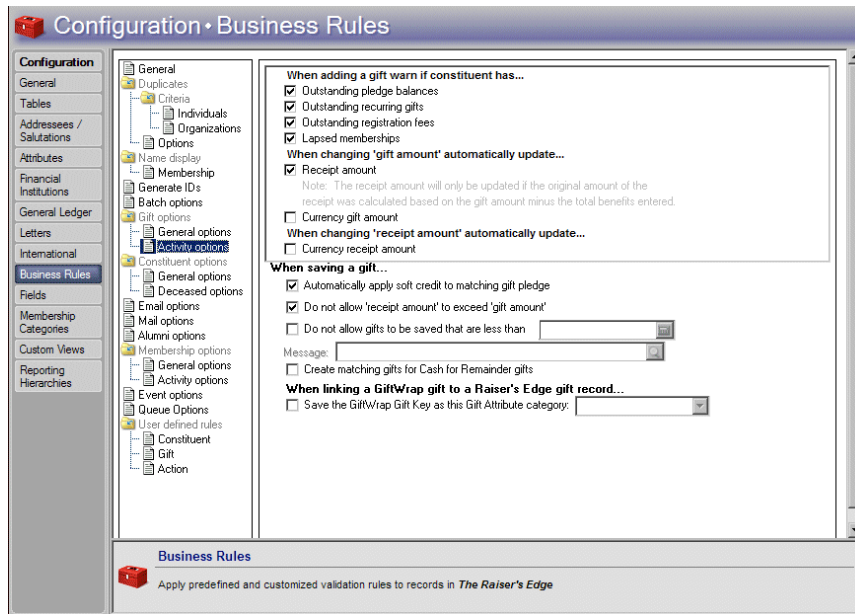
4. To default the soft credit recipients from the original gift into the Soft Credit grid on the matching gift pledge when users save a gift, mark **Automatically apply soft credit to matching gift pledge**. Each soft credit recipient automatically receives credit for the same percentage of the matching gift as they received for the initial gift.

5. To ensure that no receipt can exceed the amount of the gift for which it is issued, mark **Do not allow 'receipt amount' to exceed 'gift amount'**. If a user attempts to enter a receipt amount greater than the gift amount, a message appears.

Note: Not allowing gifts less than certain amounts to be saved can be helpful to prevent data entry errors. For example, you can specify that no gift less than $1.00 can be saved. This prevents a gift of $50.00 from inadvertently being entered as $.50.

6. To define the minimum gift amount allowed to be saved, mark **Do not allow gifts to be saved that are less than** and enter the minimum gift amount in the corresponding field.

When you mark **Do not allow gifts to be saved that are less than**, the **Message** field is enabled. In this field, enter the message to appear when a user attempts to save a gift that is less than the specified amount. A message is required.

a. For more room to view your text, click the magnifying glass. The Define Message screen appears.
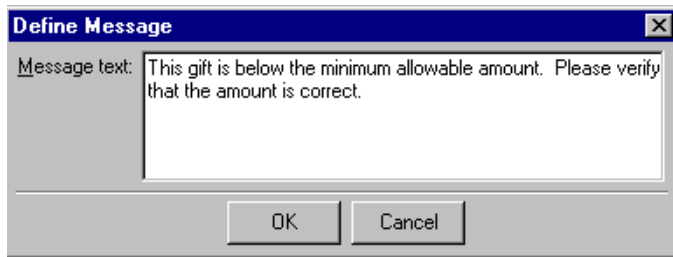
b. In the **Message text** field, enter the message to appear when a user attempts to save a gift that is less than the specified amount.

c. To save the message and close the Define Message screen, click **OK**. To close the zoom window without saving the message, click **Cancel**. You return to the Business Rules gift options activity options page.

When you leave this page, the program automatically saves your changes.

▶ **Define rules for integration with GiftWrap**

When you install and activate *Planned Giving Tracker*, this rule appears. Before you import any gift records from *GiftWrap*, you must specify the *Raiser's Edge* gift attribute category used to store the gift key from the corresponding gift record in *GiftWrap*.

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, under **Gift options**, select **Activity options**. The gift activity rule options appear.
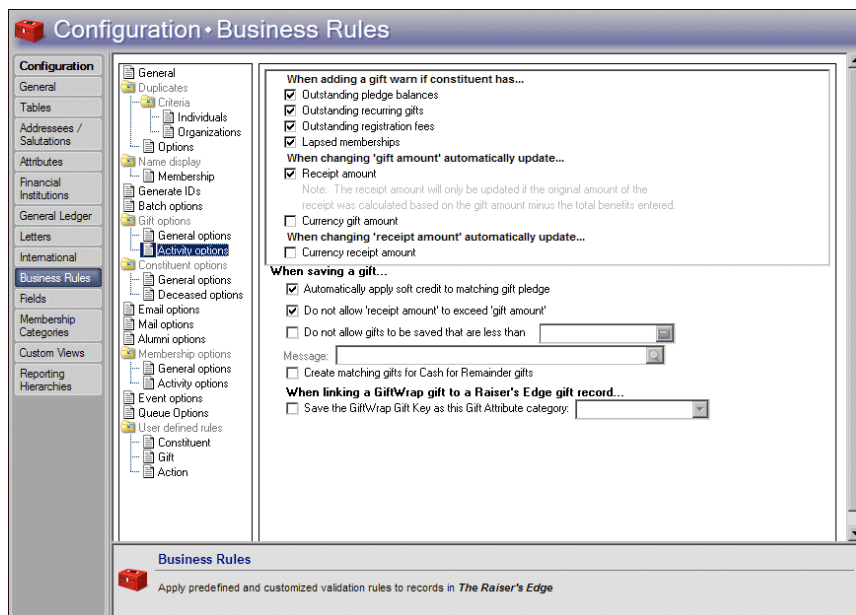
4. Under **When linking a GiftWrap gift to a Raiser's Edge gift record**, mark **Save the GiftWrap Gift Key as this Gift Attribute category** and select the category where the program stores the *GiftWrap* gift key on each corresponding *Raiser's Edge* gift record.

When you leave this page, the program automatically saves your changes.

Constituent Rules

You can set rules for general rules for such things as to change constituent names and add names to the list of aliases. You can also set rules for when you mark a person as deceased and rules when the deceased constituent has a spouse.

- "Constituent General Rules" on page 105
- "Deceased Constituent Rules" on page 108

Constituent General Rules

You can set rules for changing constituent names and adding names to the list of aliases. You can also set rules for constituents who give to an appeal that does not appear on the Appeal tab of their constituent record and rules for specifying an action type for actions created for letters.

- "Define the rule for changing constituent last names" on page 105
- "Define rules for aliases" on page 106
- "Define rules for a constituent who gives to an appeal not listed on the Appeals tab of the constituent record" on page 107
- "Define rules for automatically creating an action when sending letters" on page 108

▶ **Define the rule for changing constituent last names**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.
2. Click **Business Rules**. The Business Rules page appears.
3. From the tree view, under **Constituent options**, select **General options**. The constituent rule options appear.
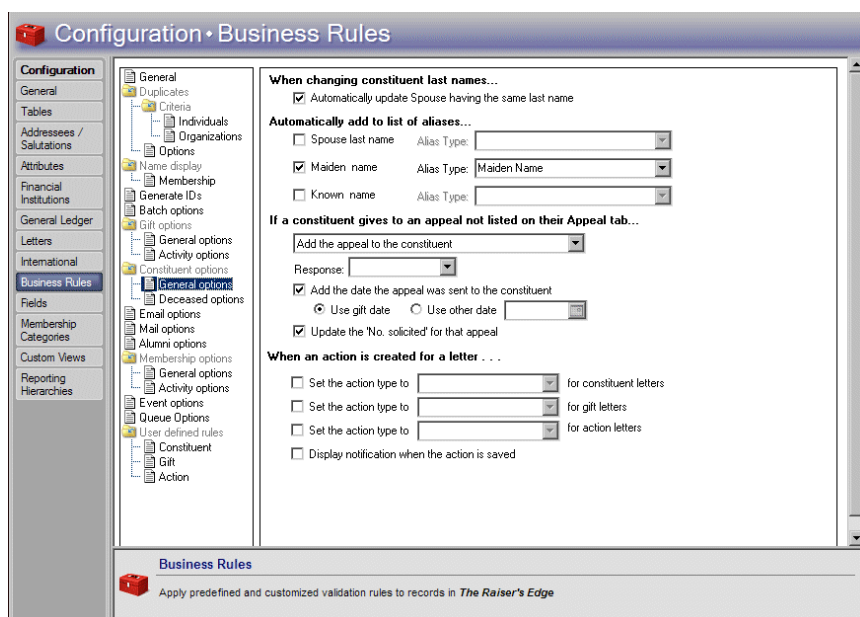
4. Under **When changing constituent last names**, if you mark **Automatically update spouse having the same last name**, when you leave the **Name** field, the last name of the spouse automatically changes to the new last name of the constituent, as long as the entry in the **Spouse name** field is the same as the constituent's last name.

If the spouse's last name is different from the constituent's last name before the change, this rule does not occur. This rule affects spouses even if they are not constituents. If you manually change the entry in the **Spouse name** field, the rule does not change the active constituent.

When you leave this page, the program automatically saves your changes.

▶ **Define rules for aliases**

You can mark checkboxes to automatically add selected names to the alias grid.

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, under **Constituent options**, select **General options**. The constituent rule options appear.
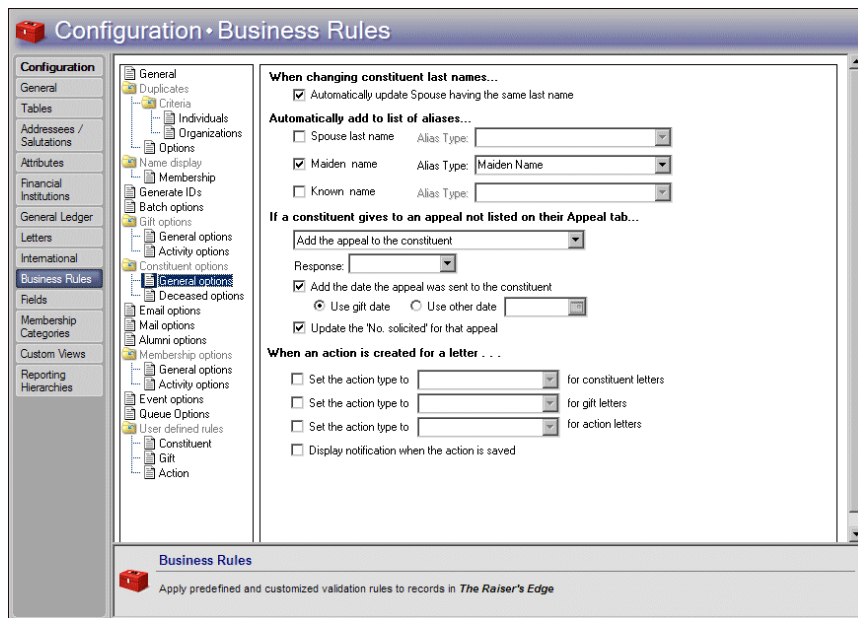
Note: Aliases are other names a constituent is known by. Aliases can include a stage name for an individual or an acronym for an organization.

4. Under **Automatically add to list of aliases**, select the types of names to automatically add to the Alias grid on the constituent record. If the entry already exists in the grid, the program does not add it again. If you mark any of these checkboxes, the value for the alias does not change if the **Maiden name** on the constituent record, **Known name** on the education record, or **Last name** on the spouse record changes.

Warning: If you mark any of the checkboxes under **Automatically add to list of aliases**, the value for the alias does not change if the **Maiden name**, **Known name**, or **Last name** changes.

- To include the spouse last name in the Alias grid, mark **Spouse last name**. In the **Alias type** field, select the alias type to save the spouse last name as in the Alias grid.

- To include the maiden name in the Alias grid, mark **Maiden name**. In the **Alias type** field, select the alias type to save the maiden name as in the Alias grid.

- To include the known name in the Alias grid, mark **Known name**. In the **Alias type** field, select the alias type to save the known name as in the Alias grid.

When you leave this page, the program automatically saves your changes.

▶ **Define rules for a constituent who gives to an appeal not listed on the Appeals tab of the constituent record**

You can set defaults for the appeal record when a constituent gives to an appeal which has not yet been added to the constituent record.

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, under **Constituent options**, select **General options**. The constituent rule options appear.

4. In the **If a constituent gives to an appeal not listed on their Appeal tab** field, select how to manage appeals when the constituent gives to one not on their Appeal tab.

   • To place the appeal on the Appeals tab of the constituent record, select "Add the appeal to the constituent".

   • To display a message asking whether to add the appeal to the constituent record, select "Ask before adding the appeal to the constituent".

   • To not add the appeal to the Appeals tab of the constituent record, select "Do not add the appeal". The fields and options in the remaining steps are disabled.

5. If, in the **If a constituent gives to an appeal not listed on their Appeal tab** field, you select "Add the appeal to the constituent" or "Ask before adding the appeal to the constituent", the **Response** field is enabled. In this field, select the default response to appear for the appeal. To view all entries for the **Response** table on the Appeal tab of the constituent record, click the down arrow. Your selection here is only a default and can be changed on the Appeals tab.

6. If, in the **If a constituent gives to an appeal not listed on their Appeal tab** field, you select "Add the appeal to the constituent" or "Ask before adding the appeal to the constituent", the **Add the date the appeal was sent to the constituent** checkbox is enabled. To automatically place a date into the **Date** column on the Appeal tab, mark this checkbox and select the date to use.

   • To use the date on which the gift given in response to the appeal is added, select **Use gift date**.

   • To use another date, select **Use other date** and enter a date in the corresponding field.

7. If, in the **If a constituent gives to an appeal not listed on their Appeal tab** field, you select "Add the appeal to the constituent" or "Ask before adding the appeal to the constituent", the **Update the 'No. Solicited' for that appeal** checkbox is enabled. To increase the number in the **No. solicited** field on the appeal record by one, mark this checkbox.

When you leave this page, the program automatically saves your changes.

▶ **Define rules for automatically creating an action when sending letters**

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, under **Constituent options**, select **General options**. The constituent rule options appear.

4. Under **When an action is created for a letter**, specify the action types to default when Microsoft *Word* mail merges creates constituent letters, gift letters, or action letters. When you mark **Set the action type to**, you can select a default type for actions created for the applicable letters.

   When a new action record is created from a letter, the **Action type** is set to the selected type. When an existing action record is updated because of a letter, the **Action type** is set according to your entry here only if you have not already selected a type for that action record. If an existing action record already has an **Action type** defined, it is not overwritten.

   If you do not select an entry in the **Set the action type to** field, new action records created from letters contain no entry in the **Action type** field, and existing records are not updated.

5. To display a message to notify you that the action was saved each time you send a letter, mark **Display notification when the action is saved**.

   When you leave this page, the program automatically saves your changes.

Deceased Constituent Rules

Warning: Business rules are not retroactive. When you set any deceased business rules, they do not apply to records that are already marked deceased. A rule applies only to records you mark deceased after setting the rule.

You can set rules for when you mark a person as deceased and rules when the deceased constituent has a spouse.

- "Define rules for marking a person deceased" on page 109
- "Define rules for when a deceased constituent has a spouse" on page 110

▶ **Define rules for marking a person deceased**

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, under **Constituent options**, select **Deceased options**. The deceased rule options appear.
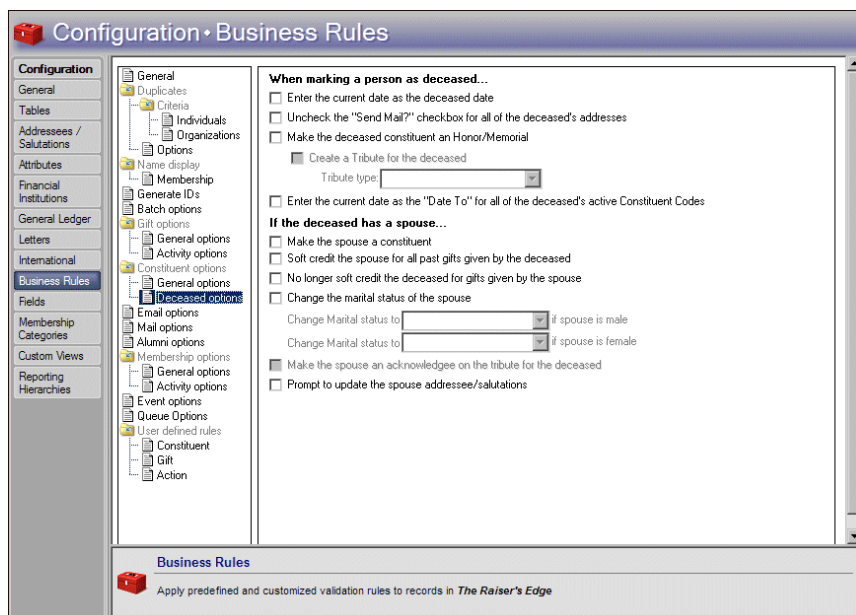
Business rules are not retroactive. So when you set any deceased business rules, they do not apply to records that are already marked deceased. A rule applies only to records you mark deceased after setting the rule.

4. Under **When marking a person deceased**, to default the current date as the deceased date, mark **Enter the current date as the deceased date**.

5. To unmark **Send mail to this address** on each address in the deceased constituent's record, mark **Uncheck the "Send mail?" checkbox for all of the deceased's addresses**. Mail will not be sent to any of the deceased's addresses in future mailings.

6. If you have the optional module *Honor/Memorial Tracking*, select whether to make the deceased constituent an honor/memorial. An honor/memorial is a constituent who is honored or memorialized by gifts donated to your organization. When you mark **Make the deceased constituent an Honor/Memorial**, the **Constituent is an honor/memorial** checkbox on the Honor/Memorial tab of the deceased's constituent record is automatically marked.

   When you designate a constituent as an honor/memorial, the constituent is an honoree in your database. You can refer to the constituent as an honor/memorial or as the honoree receiving gifts.

7. When you mark **Make the deceased constituent an Honor/Memorial**, the **Create a tribute for the deceased** checkbox is enabled. To create a tribute for the deceased constituent, mark this checkbox and select an entry in the **Tribute type** field. A tribute explains the reason why you honor or memorialize a constituent.

8. To enter the deceased date as the ending date for all active constituent codes assigned to the constituent (only those that have no entry in the **Date to** field), mark **Enter the current date as the "Date to" for all the deceased's active constituent codes**.

   When you leave this page, the program automatically saves your changes.

▶ **Define rules for when a deceased constituent has a spouse**

Warning: Business rules are not retroactive. So when you set any deceased business rules, they do not apply to records that are already marked deceased. A rule applies only to records you mark deceased after setting the rule.

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, under Constituent options, select **Deceased options**. The deceased rule options appear.
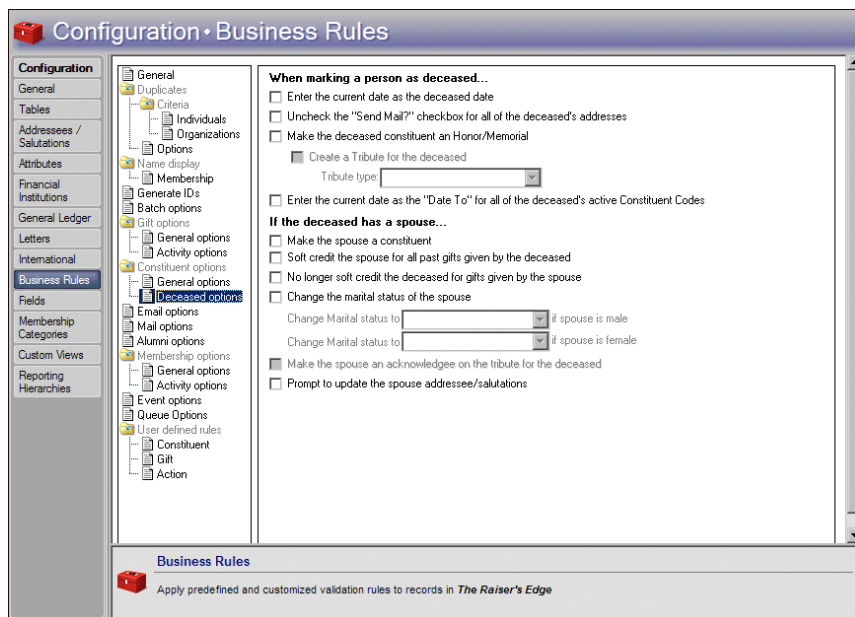
4. Under **If the deceased has a spouse**, select whether to convert the non-constituent spouse of the deceased constituent into a constituent. When you mark **Make the spouse a constituent**, if the deceased constituent has a spouse who is not a constituent, the spouse becomes a constituent.

5. To soft credit the spouse with the amount of each gift previously received from the deceased constituent, mark **Soft credit the spouse for all past gifts given by the deceased**. If the deceased constituent has a spouse who is a constituent or is becoming a constituent through the **Make the spouse a constituent** checkbox, the spouse receives a soft credit for the full amount for each gift previously given by the deceased constituent. If the spouse already received soft credit for a gift, he or she does not receive soft credit for the same gift again.

   When you mark **Soft credit the spouse for all past gifts given by the deceased**, you can review the complete giving history of the deceased constituent from the spouse record.

6. To prevent the deceased constituent from receiving soft credit for gifts you receive from the spouse, mark **No longer soft credit the deceased for gifts given by the spouse**. If the deceased constituent has a spouse who is a constituent or is becoming a constituent through the **Make the spouse a constituent** checkbox, the **Automatically soft credit this individual for gifts** is automatically unmarked on the spouse record.

   For example, Robert Hernandez is a deceased constituent and his wife Wendy Hernandez is also a constituent. When you mark **No longer soft credit the deceased for gifts given by the spouse** and mark Robert Hernandez as deceased, the **Automatically soft credit this individual for gifts** checkbox is unmarked on the relationship to Robert Hernandez accessed from Wendy Hernandez's constituent record. This indicates that you should no longer soft credit Robert for gifts you receive from Wendy.

Warning: If **Gender** is not defined on the spouse relationship record, the marital status does not change for a spouse even if you mark **Change the marital status of the spouse**.

7. To change the marital status of the spouse, mark **Change the marital status of the spouse** and select an entry in the **Change Marital status to { } if spouse is male** and **if spouse is female** fields. If the deceased constituent has a spouse who is a constituent or is becoming a constituent through the **Make the spouse a constituent** checkbox, the spouse's marital status changes to the specified status when you mark the constituent as deceased. If **Gender** is not defined in the spouse relationship record, the marital status does not change.

8. When you mark both **Make the deceased constituent an Honor/Memorial** and **Create a tribute for the deceased** under **When marking a person as deceased**, the **Make the spouse an acknowledgee on the tribute for the deceased** checkbox is enabled. To create a tribute with the spouse as an acknowledgee, regardless of whether the spouse is a constituent, mark this checkbox.

    Since acknowledgees who are not constituents must have an address, if the spouse is not a constituent and does not have an address, the spouse is not added as an acknowledgee on the tribute.

9. To receive a reminder to update addressee/salutations for the constituent, mark **Prompt to update the spouse addressee/salutations**. When you mark a constituent deceased, after any other deceased options you have set are completed and the constituent record is saved, the Update Spouse Addressee/Salutations screen appears so you can edit the addressee/salutations for the deceased constituent.

    When you leave this page, the program automatically saves your changes.

Email Rules

You can select to automatically create an action when an email is sent to a constituent. When you integrate *The Raiser's Edge* with Microsoft *Outlook*, you can also indicate settings for actions saved for incoming emails and appointments.

▸ **Define rules for creating actions from emails**

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, select **Email options**. The email rule options appear.
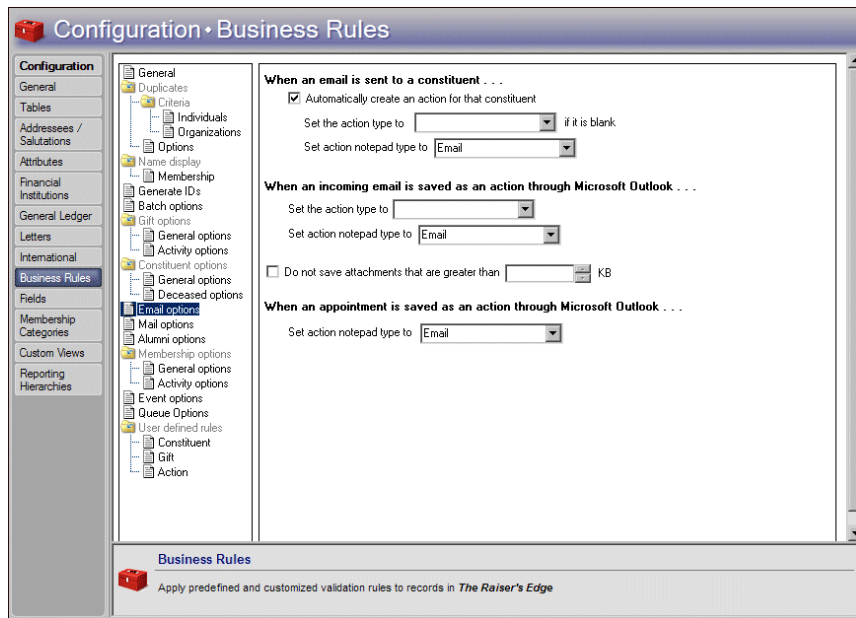
4. Under **When an email is sent to a constituent**, the **Automatically create an action for that constituent** checkbox defaults to marked. When this checkbox is marked, when users click the email address on the Bio 1 tab or select **Constituent**, **Send email** from the menu bar to send an email message from a constituent record, your default email program opens.

Note: If an email is sent from a relationship record, the action is created for the constituent from which the relationship is being viewed. For example, if, from the Relationships tab of AAA Concrete's constituent record, you open the relationship to Martin Shultz and send an email to Martin Shultz, the action is created for AAA Concrete, not Martin Shultz. This is also true for non-constituent relationships. If you open a non-constituent relationship from a constituent record, the action is created for the constituent.

When you complete and send the email, the program automatically creates an action that includes this information:

- **Action Date**: current date

- **Action Type**: See **Set the action type to** field in step 5

- **Action Notes**: subject line and notes

- **Completed**: checkbox is marked

- **Completed Date**: current date

- **Start Time**: current time

- **Email address**: address to which message was sent

- **Solicitor**: constituent name of user (as entered in security)

- **Campaign and Fund**: defaults from solicitor

- If you have *Outlook* 2000 or XP installed on your computer, any text entered in the **Subject** or **Body** fields is included in the **Notes** for the created action.

To not create an action for a constituent when you use *The Raiser's Edge* to send email to that constituent, unmark **Automatically create an action for that constituent**.

If you do not use *Office* XP or 2003, go to step 6.

5. If you use *Office* XP or 2003, please read this information.

The latest versions of *Office* have a security feature to prevent viruses from accessing *Outlook's* address book and sending messages without your knowledge. When another application such as ***The Raiser's Edge*** attempts to connect with *Outlook*, a message appears to ask whether to allow it.

- To deny ***The Raiser's Edge*** access to *Outlook*, click **No**. An explanation appears, and no message is sent.

Note: To avoid numerous appearances of the security message, allow ***The Raiser's Edge*** to access *Outlook* for one minute.

- To allow ***The Raiser's Edge*** one-time access to *Outlook*, click **Yes**. To send an email and create an action, ***The Raiser's Edge*** must access *Outlook* several times. Each access causes a separate warning message to appear.

- To allow ***The Raiser's Edge*** access to *Outlook* and avoid numerous warning messages, specify an amount of time (by default, one minute) that ***The Raiser's Edge*** can access *Outlook.* By default, you can allow ***The Raiser's Edge*** to access *Outlook* for 1 minute. The email is sent, and the action is created.

6. If you mark **Automatically create an action for that constituent**, select entries to **Set the action type to** and **Set the action notepad type to** if the fields are blank.

   When a new action record is created when you send an email, the action and action notepad types are set to the type you select here. When an existing action record is updated when you send an email, the **Action type** is set according to your entry here only if you have not already selected a type for that action record. If an existing action record already has an **Action type** defined, it is not overwritten.

   If you do not select an entry in the **Set the action type to** and **Set the action notepad type to** fields, new action records created from sending emails contain no entry in the **Action type** or **Action Notepad** fields, and existing records are not updated.

Note: Integration is available only with *Outlook* version 2000 or higher. For more information about setting up the integration, see *The Raiser's Edge & Microsoft Office Integration Guide*.

7. Under **When an incoming email is saved as an action through Microsoft Outlook**, select how to handle emails saved as actions through the integration with *Outlook*. When you integrate ***The Raiser's Edge*** with *Outlook*, a **Create action** button appears on the toolbar in received emails. The settings specified in these business rules affect actions created when users click this button.

   a. Select entries to **Set the action type to** and **Set the action notepad type to** if the fields are blank. The notepad type is required and defaults to "Email." The body of the email is saved as a notepad in the action record created from the email.

   b. To specify the maximum size of attachments to save in your database, mark **Do not save attachments that are greater than** and specify a size. Any attachments that exceed this size are not saved with the email in your database.

8. Under **When an appointment is saved as an action through Microsoft Outlook**, specify the default notepad type for actions created from *Outlook* appointments.

   When you leave this page, the program automatically saves your changes.

Mail Options

To work with eReceipts through the Receipts mail task in *Mail* or use the Send as Mail action in *Queue*, you must specify an Simple Mail Transfer Protocol (SMTP) mail server, port number, and authentication method to use to send email.

If you use *PostalSaver*, you can select whether to use the United States Postal Service (USPS) IntelligentMail barcode to sort mailings.

▶ **Define rules for mail**

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, select **Mail options**. The mail option appears.

4. In the **SMTP email server** field, enter the name of the server used for email.

5. The **Port Number** field entry defaults to 25. This setting defines the TCP/IP port used by the server. Port 25 is the Internet standard for receiving SMTP mail. To use a different port, enter the number in this field.

6. In the **SMTP authentication method** field, select the type of authentication to use with the server.

   • To not require authentication, select Anonymous.

   • To use basic/clear text authentication, select Basic and enter the user name and password to use during authentication.

   • To use NT LAN Manager protocol to authenticate users, select NTLM.

7. In the **"From" address for Queue email** field, enter the email address that should appear as the sender when you send scheduled queue notifications and scheduled queue report items as email.

8. Select whether to use Secured Socket Layers (SSL) with the server. If you use basic authentication with the server, we recommend you use SSL.

9. If you use the optional module *PostalSaver*, the **Use Intelligent Mail barcodes** checkbox appears. To use the 65-character IntelligentMail barcode to sort and track mailings with the USPS, mark this checkbox. To use the 62-character Delivery Point Validation (DPV) barcode, do not mark this checkbox.

   When you leave this page, your changes are automatically saved.

Alumni Rules

If you have *Alumni Tracking*, the **Alumni options** appear. To establish a format for "class of" year and define rules for adding alumni information to constituents, use these options. You can set rules to automatically enter a default school on the education record and to include a default constituent code on constituent records to which you add a primary education record.

• "Establish a "class of" year format" on page 115

• "Define rules to add education information when the primary alumni checkbox is marked" on page 115

▶ **Establish a "class of" year format**

You can select to display the year a constituent graduated in either a two or four year format. This selection affects reports, mailings, and any addressee or salutation that includes "class of."

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, select **Alumni options**. The alumni rule options appear.
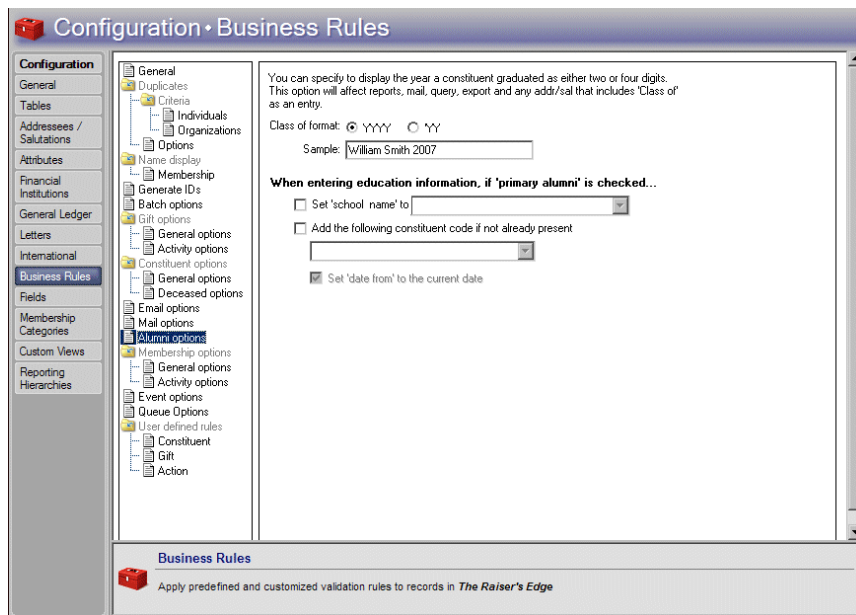
4. For **Class of format**, select how to display year a constituent graduated in. The "class of" date always appears in the format selected here, regardless of your *Windows* Regional Date settings. To eliminate any chance of ambiguity in your records, we recommend you select the four year format.

   • To display the year in a four-digit format, select **YYYY**.

   • To display the year in a two-digit format, select **YY**.

   The **Sample** frame displays an example of your format selection.

   When you leave this page, the program automatically saves your changes.

▶ **Define rules to add education information when the primary alumni checkbox is marked**

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, select **Alumni options**. The alumni rule options appear.
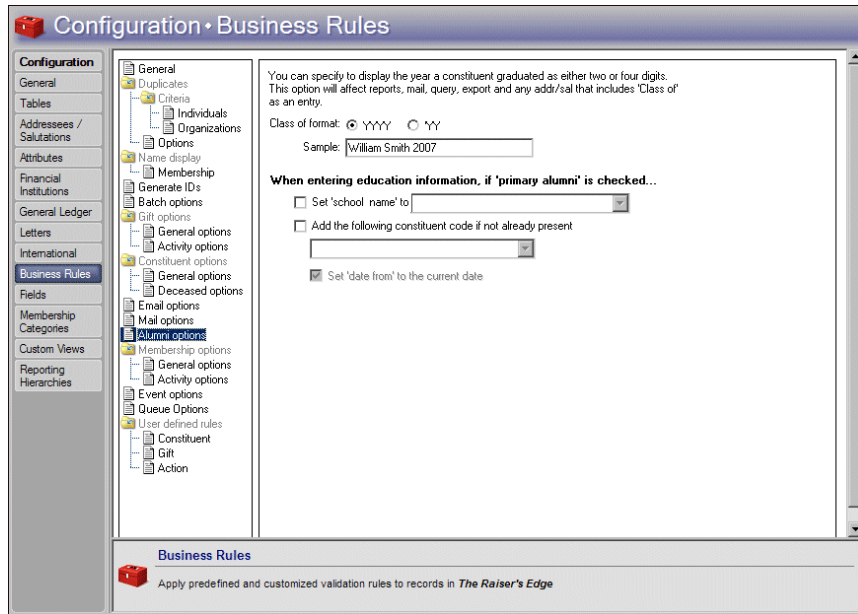
Note: When you mark **Add the following constituent code if not already present** and enter a code in the corresponding field, all active constituent records to which you add a primary education record contain at least one constituent code. Constituent codes explain why constituents are in your database.

4. To automatically populate the **School name** field on education records that have the **Primary alumni** checkbox marked, mark **Set 'school name' to** and enter a default school name.

5. To specify a constituent code to include when you add a primary education record to a constituent record, mark **Add the following constituent code if not already present** and enter the constituent code to include. To access a list of established codes, click the drop-down arrow.

When you mark **Add the following constituent code if not already present**, the **Set 'date from' to the current date** checkbox is enabled. To automatically enter the current date in the **Date from** field for the specified constituent code, mark this checkbox.

When you leave this page, the program automatically saves your changes.

Membership Rules

If you have *Membership Management*, the **Membership options** appear. You can establish General and Activity rules for memberships.

*   "Membership General Options" on page 116
*   "Membership Activity Options" on page 118

Membership General Options

Note: You do not have to activate any of the General Membership Rules.

You can define rules for membership categories with gift defaults that are already established, membership transactions that are linked to a pledge, and other general defaults for memberships.

Define rules for start dates for new or renewed memberships, rules for linking gifts to memberships, rules for applying pledge payments to memberships, rules for program/categories for dues, and rules for the maximum number of members for a membership. Using these rules to set defaults lets *The Raiser's Edge* enter information when you create new memberships, saving you the time of entering it manually.

▶ **Define general rules for memberships**

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, under **Memberships**, select **General options**. The general rule options for memberships appear.
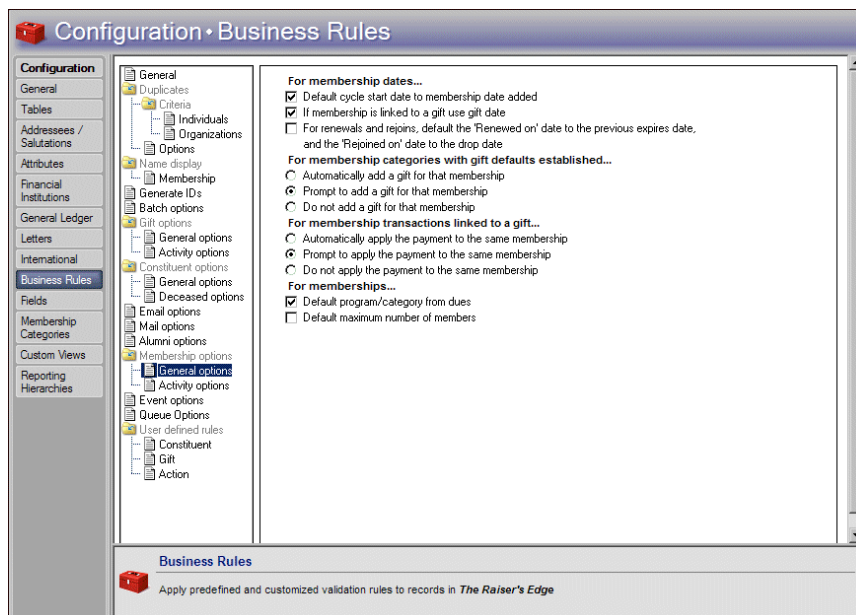
4. Under **For membership dates**, to default the **Joined on** and **Renewed on** dates to the date the membership is added, mark **Default cycle start date to membership date added**. Typically, this is the current date.

Note: If you globally add a membership record through *Administration*, the **Joined on** date defaults to the current program date, no matter what setting you select in **Business Rules**.

5. When you mark **Default cycle start date to membership date added**, the **If membership is linked to a gift use gift date** checkbox is enabled. To default the **Joined on** and **Renewed on** dates to the gift date for memberships that are linked to gifts, mark this checkbox. This rule applies only to memberships created from a gift record. Linking a membership to a gift from the membership record does not change the gift date. If the membership is not linked to a gift, the date defaults to the date the membership is added. For more information about Memberships given as gifts and how they are linked, see the *Membership Data Entry Guide*.

Note: A membership transaction includes all individual membership activities on the membership record, such as renewals, rejoins, drops, upgrades, and downgrades.

6. When you mark **Default cycle start date to membership date added**, the **For renewals and rejoins, default 'Renewed on'/'Rejoined on' date to previous 'Expires' date** checkbox is enabled. To change the **Expires date** of the previous membership transaction to the **Renewed on** or **Rejoined on** date for the renewal or rejoin being entered, mark this checkbox. You can use this checkbox to avoid overlapping memberships if a member renews before the current membership expires.

7. Under **For membership categories with gift defaults established**, if you set up gift defaults for a membership category, select how to manage membership categories that have gift defaults established. For information about establishing gift defaults for a membership category see "Define general information for a membership category" on page 135.

   • To automatically add a gift for the membership dues and link it to the membership, select **Automatically add a gift for that membership**.

Note: You can automatically add the cost of a membership as a gift on the constituent record.

   • To display a message to ask whether to add the gift and link it to the membership, select **Prompt to add a gift for that membership**.

   • To not add a gift for the membership, select **Do not add a gift for that membership**. You can still manually add the gift and link it to the membership.

8. Under **For membership transactions linked to a gift**, select how to apply the payment to the membership.

   • To apply the payment to the same membership as the pledge but not add a membership transaction, select **Automatically apply the payment to the same membership**. Typically, if you select this option, you do not renew, rejoin, upgrade, or downgrade the membership with pledge payments.

   • To display a message to ask whether to apply the pledge payment to the membership, select **Prompt to apply the payment to the same membership**.

   • To not automatically apply the payment to the membership, select **Do not apply the payment to the same membership**. When you select this option, the program assumes you manually link pledge payments to memberships.

9. Under **For memberships**, to default the program and category for a membership once the dues are entered, mark **Default program/category from dues**. For example, you may specify a program and category for minimum dues of $1,000 and maximum dues of $2,000. When you mark this checkbox and create a new membership, if you enter a dues amount between the above amounts, the program and category automatically default into the membership record. You can overwrite these defaults.

10. To default the maximum number of members from **Membership Categories** to the **Total number of members on this membership** field on the Other Members and Card Information screen of the membership record, mark **Default maximum number of members**.

   When you leave this page, the program automatically saves your changes.

Membership Activity Options

Note: You can set rules to establish whether constituents can have multiple memberships at the same time.

You can set rules to add new memberships, save gifts of membership, and renew memberships. Decide whether to allow multiple concurrent memberships for constituents and who gets credit for gifts of membership. You can set a rule to determine the maximum period of time you allow a lapsed membership to be renewed.

▸ **Define activity defaults for memberships**

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, under **Membership**, select **Activity options**. The activity rule options for memberships appear.
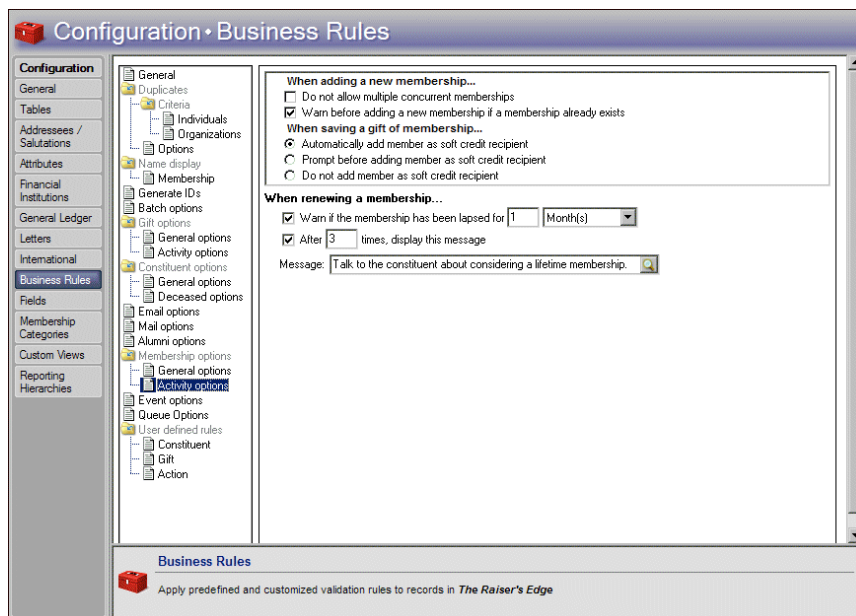
4. Under **When adding a new membership**, select whether to enable multiple memberships for one constituent.

Note: When you mark **Do not allow multiple concurrent memberships**, the **Warn before adding a new membership if a membership already exists** checkbox is disabled.

- If you do not allow constituents to have multiple memberships at the same time, mark **Do not allow multiple concurrent memberships**. If a user attempts to add multiple memberships to a constituent, a message appears.

- To allow constituents to have more than one membership at the same time, mark **Warn before adding a new membership if a membership already exists**. When you mark this checkbox, if a user tries to add a new membership to a constituent who already has a membership, a message appears.

5. Under **When saving a gift of membership**, select whether and how to add members as soft credit recipients when you save a gift of membership.

- To add members who receive gifts of membership linked to the gift record of the individual who gave the gift as soft credit recipients, select **Automatically add member as soft credit recipient**. This applies only to the primary member, not joint members.

- To display a message to ask whether to add each member as a soft credit recipient, select **Prompt before adding member as soft credit recipient**. You may want to select this option if, for example, a husband has a constituent record in the database and gives a gift of membership to his wife who is also a constituent. Because the husband pays the dues, you can link the membership to a gift on his record. To also display the gift on the wife's gift history and soft credit her record, you can select **Automatically add member as soft credit recipient**, or you can select the option and click **Yes** on the message screen.

- To not add a soft credit to the record of the primary member, select **Do not add member as soft credit recipient**.

Note: You may want to set warnings for membership expirations if you do not allow renewals for memberships that have been lapsed for a certain period of time, or if you track memberships by dropping and rejoining them.

6. Under **When renewing a membership**, to set a time period for which a membership has been lapsed before the program triggers a warning, mark **Warn if the membership has been lapsed for**. For example, if your organization does not renew memberships lapsed for over a month, set a warning to appear when a membership has been lapsed for this amount of time.

7. To define a warning message to appear after a membership has been renewed a certain number of times, mark **After [ ] times, display this message** and specify the number of membership renewals allowed before you display the warning. In the **Message** field, enter the text to appear in the warning. For example, you can create a message to warn a user to ensure the address and phone information on the member's constituent record is up to date after a yearly membership has been renewed two times.

Note: An entry in the **Message** field is required. There is no default message.

To more easily view the text you enter, click the magnifying glass in the **Message** field. The Define Message screen appears.

When you leave this page, the program automatically saves your changes.

Event Rules

These rules are available only if you have the optional module *Event Management*. You can select rules to warn when event capacity is reached, whether a constituent can register more than once for an event, and whether to treat registration fees as constituent gifts.

▶ **Define rules for adding participants to an event**

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, select **Event options**. The rules options for events appear.
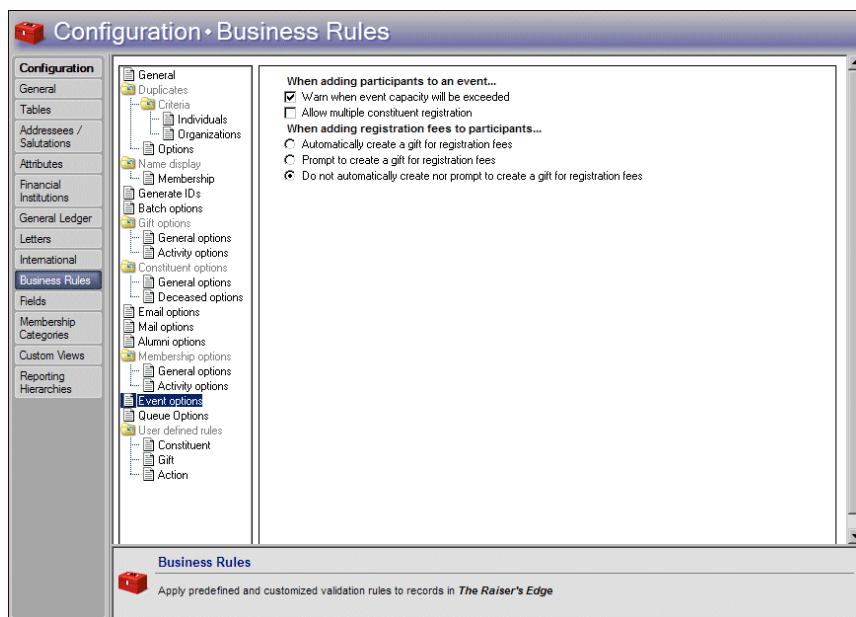
Note: You can set a rule for a warning to appear when an event has reached the capacity you specified in the optional module *Event Management*. However, you can override the event capacity and continue to add participants. For example, you may discover that you can fit an additional table into your banquet hall so the event can now exceed its original capacity.

4. Under **When adding participants to an event**, to display a warning when the user adds a participant who makes the total participants exceed the number set as the event capacity, mark **Warn when event capacity will be exceeded**. For example, you mark this checkbox and set the capacity at 150. When a user attempts to add a participant who will result in a total of 151 participants, a message appears to inform the user of this.

   On this message, if the user marks **Do not show this message again**, a warning does not appear when users add more participants to this event. The **Do not show this message again** checkbox applies only to the currently open event, not all events. If you do not specify an event capacity, the message does not appear for that event.

5. To enable a constituent to register for an event more than once, mark **Allow multiple constituent registration**.

   If you do not mark the checkbox, you do not allow multiple registrations for constituents. When you add a participant who is a constituent to an event, the program checks to see if the constituent is already linked to the event. If the constituent is already linked, a message appears.

6. Under **When adding registration fees to participants**, select whether and how to create a gift record for registration fees you receive.

   • To automatically add the registration fees to the gift record of the participant, select **Automatically create a gift for registration fees**. For this to occur, the participant must be a constituent in your database, the gift cannot already be linked to the participant, and you must have added a row to the registration fees grid and specified a fund for gift defaults on the event record.

   The program creates a gift for the participant record only. Any applicable benefits that have not been waived default into the participant record.

   • To display a message to ask whether to add registration fees to the gift record of the participant, select **Prompt to create a gift for registration fees**.

   • To not add registration fees to the participant's gift record, select **Do not automatically create nor prompt to create a gift for registration fees**. To create a gift, you can still select **Link to Gift** on the Registration Fees/Donations tab of the event record.

   When you leave this page, the program automatically saves your changes.

Queue Rules

You can specify rules to add recurring queues to the schedule and remove them after they process.

▶ **Define rules for recurring queues**

1. On the Raiser's Edge bar, click **Config**. The Configuration page appears.
2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, select **Queue options**. The rules options for queues appear.
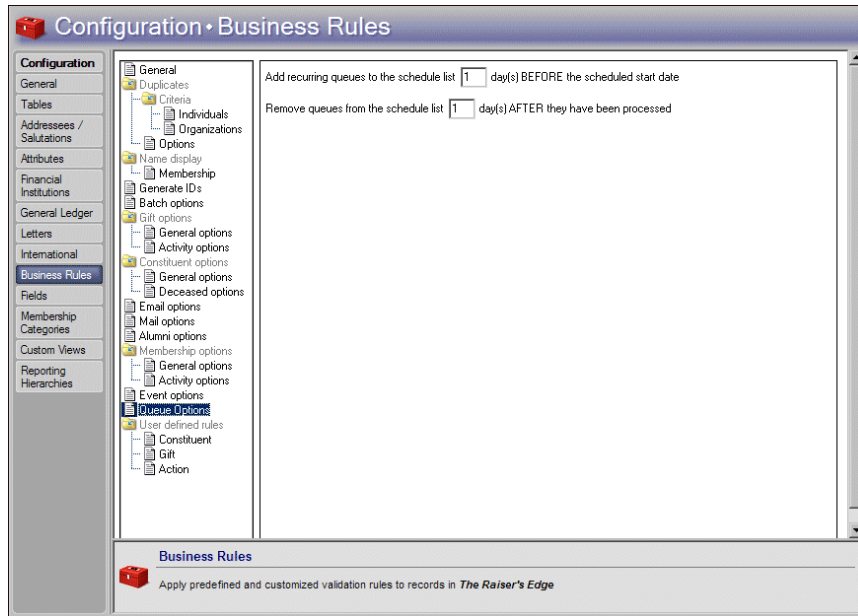
4. To add recurring queues to the Queue Schedule screen a specific number of days before the queue runs, enter the number of days in the **Add recurring queues to the schedule list [ ] day(s) BEFORE the scheduled start date** field. For example, to add recurring queues to the Queue Schedule screen two days before a queue is scheduled to run, enter "2".

When you change the number of days entered for this business rule, the Queue Schedule screen is not automatically updated. For existing recurring queues to update on the Queue Schedule screen, either run or resave existing queues you created before you changed this business rule. For example, you created and scheduled a membership queue. The membership queue is on the Queue Schedule screen, waiting to run. When you change the number of days you initially entered for this business rule, the membership queue is not affected on the Queue Schedule screen. To update the queue, you must either run or resave the queue for the business rule.

5. To remove recurring queues from the Queue Schedule screen a specific number of days after the queue is processed, enter a number in the **Remove queues from the schedule list [ ] day(s) AFTER they have been processed** field. For example, to remove recurring queues from the Queue Schedule screen one day after a queue processes, enter "1".

When you leave this page, the program automatically saves your changes.

User Defined Rules

Opening constituents, adding gifts, and adding actions can all cause user defined business rules to activate.

Rules you create display a message if the constituent being opened, or the gift or action being added, meets the criteria of a constituent query which you have specified. For constituent rules, you can also specify the rule execute when gifts or actions for a constituent are accessed directly without first opening the constituent record.

Note: If you open a record that meets the query criteria for multiple rules, multiple messages display.

For example, you can create a query to include all constituent records with the constituent code Board Member. Then, you can base a rule on the query specifying that a message appears advising extreme care any time a board member's constituent record is opened. For gifts, you can specify that any time a gift is added for a constituent who normally gives anonymously, a message appears asking whether the current gift is also anonymous. For actions, you can specify that a warning appear if an action is being added for a constituent who does not want to receive phone calls.

"Create an opening constituents rule" on page 123

"Create an adding gifts rule" on page 125

"Create an adding actions rule" on page 127

▶ **Create an opening constituents rule**

You can create rules"User Defined Rules" on page 122 to display messages when a user opens selected constituent records. Users can also activate rules when they open a gift or action for certain constituents directly through **Actions** or **Gifts** rather than through the constituent record. This procedure demonstrates how to make a rule to warn users to take special care when opening the constituent record of a board member.

> *Scenario:* You need to add a new Business Rule warning your users to take special care when opening the constituent record of one of your board members.

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

2. Click **Business Rules**. The Business Rules page appears.

Note: Opening constituents rules do not affect batches, imports, or global changes.

3. From the tree view, under **User defined rules**, select **Constituent**. The Opening Constituent Rules grid appears.
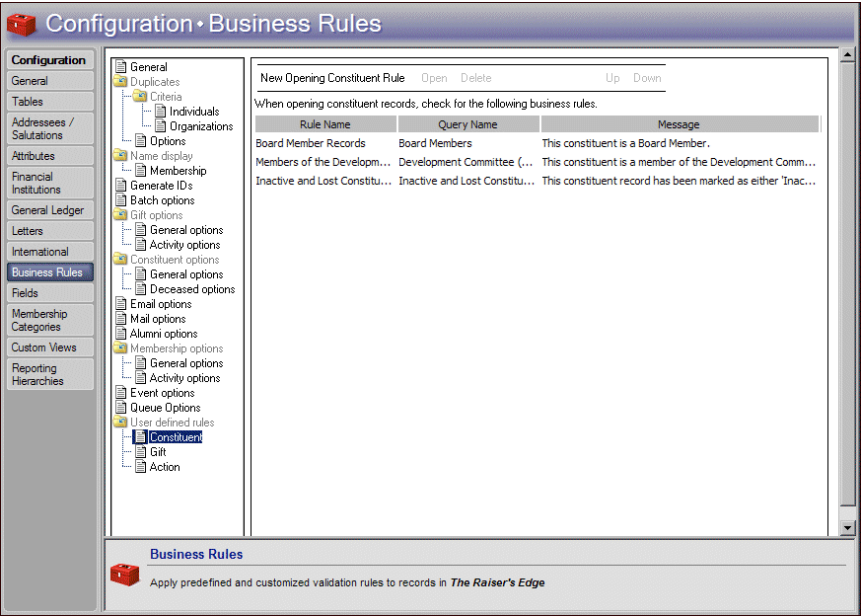
Note: Business rules you define are based on queries you have created and saved.

In the grid, any rules defined appear. **Rule Name** displays the name assigned the rule, **Query Name** displays the query on which the rule is based, and **Message** displays the text that appears when a user activates the rule.

4. On the action bar, click **New Opening Constituent Rule**. The New Rule for Opening Constituents screen appears.

Warning: We recommend you base your rules on dynamic queries. Dynamic queries automatically update to include records you add after you create the query. When you base your rule on a dynamic query, you ensure any record meeting the criteria activates the rule, regardless of when the record is added. Rules based on static queries may not activate for all records meeting the criteria you establish.

5. In the **Rule name** field, enter "Board Member Caution Message" to identify the new rule in the grid on the Business Rules page.

6. In the **Query name** field, enter the name of the constituent query on which to base the rule, or click the binoculars to find the query. You can select any saved dynamic or static constituent query or create a new one. Queries filter and extract information from the program.

   We recommend you base your rules on dynamic queries. Dynamic queries automatically update to include any new records you add that meet the query criteria. For more information on how to create a query, see the "Query" section of the *Query & Export Guide*. For this rule, select a dynamic constituent query that includes only those constituent records with the constituent code "Board Member."

7. In the **Message** box, enter the text to appear when the new rule executes. For this rule, the text reads "This constituent is a Board Member. Please use extreme care when entering or editing information in this record."

Note: If you want to make a line break in the **Message** field, press CTRL + ENTER on your keyboard. When you press ENTER by itself, the program attempts to save and close the rule.

8. To apply the rule to only selected security groups, mark **Apply Rule to Selected Security Groups Only**. The selection box is enabled. For more information about security groups, see the "Security" chapter of this book. To move selected groups from the **Security Groups** box into the **Apply Rule to these Security Groups** box, use the arrows. The business rule affects only those groups you move into this box.

   To apply the rule to all users, leave **Apply Rule to Selected Security Groups Only** unmarked.

Note: If a user is in more than one security group, and at least one group is affected by a rule, the rule activates for that user.

9. To activate the rule when the user adds a gift for a constituent coded as a board member directly from the **Gifts** link of *Records* rather than from the constituent record, mark **Gifts**. When a gift is added to a board member's constituent record, the message appears.

10. To activate the rule when the user adds an action for a constituent coded as a board member directly from the **Actions** link of *Records* rather than from the constituent record, mark **Actions**. When an action is added to a board member's constituent record, the message appears.

11. To save the new rule, click **OK**.You return to the Business Rules page. In the grid, the new rule now appears.

▶ **Create an adding gifts rule**

You can create rules"User Defined Rules" on page 122 to activate when your users add selected gift records.This procedure demonstrates how to create a rule that displays a message when a user enters a gift for a constituent who normally gives anonymously.

> *Scenario:* You need to add a new Business Rule to display a message whenever one of your users enters a gift for a constituent who normally gives gifts anonymously. You want to verify whether or not the new gift should also be entered as an anonymous gift.

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, under **User defined rules**, select **Gift**. The Adding Gift Rules grid appears.
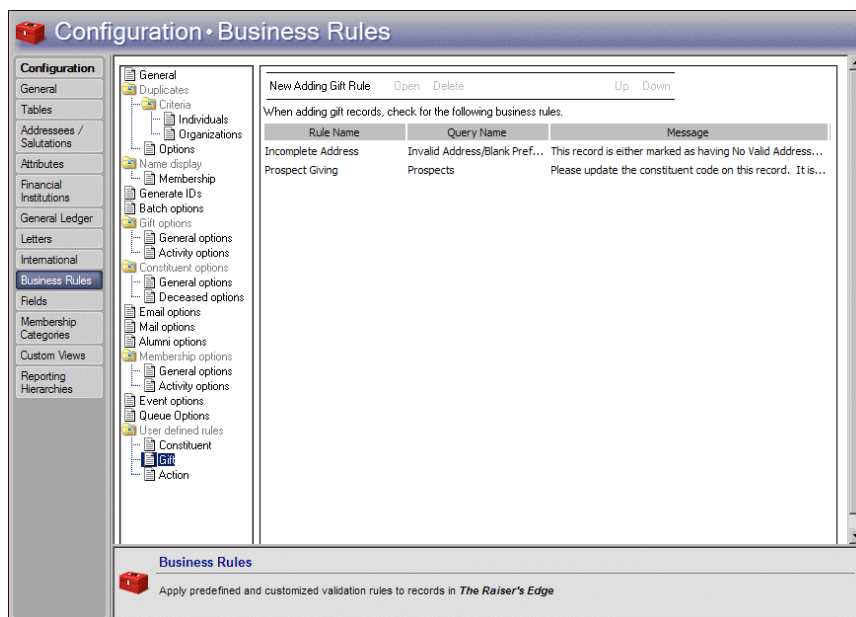
Note: All user defined business rules are based on constituent queries. Constituent queries contain all the available criteria fields available in other types of queries.

In the grid, any rules you defined appear. **Rule Name** displays the name assigned the rule, **Query Name** displays the query on which the rule is based, and **Message** displays the text that appears when the rule is activated.

4. On the action bar, click **New Adding Gift Rule**. The New Rule for Adding Gifts screen appears.

5. In the **Rule name** field, enter "Anonymous Gift Donor Warning" to identify the new rule in the grid on the Business Rules page.

Warning: We recommend you base your rules on dynamic queries. Dynamic queries automatically update to include records added after you create the query. When you base your rule on a dynamic query, you ensure that any record meeting the criteria activates the rule, regardless of when the record is added. Rules based on static queries may not activate for all records meeting the criteria you establish.

6. In the **Query name** field, enter the name of the query on which to base the rule, or click the binoculars to find a query. You can select any saved dynamic or static constituent query or create a new one. Queries filter and extract information from the program.

    We recommend you base your rules on dynamic queries. Dynamic queries automatically update to include any new records you add that meet the query criteria. For more information on how to create a query, see the "Query" section of the *Query & Export Guide*. For this rule, select a dynamic constituent query that includes only those constituent records with the **Constituent normally gives gifts anonymously** checkbox marked.

7. In the **Message** box, enter the text to appear when the new rule executes. For this rule, the text reads "This constituent has donated anonymously in the past, is this an anonymous gift?"

Note: If a user is in more than one security group, and at least one group is affected by a rule, the rule activates for that user.

8. To apply the rule to only selected security groups, mark **Apply Rule to Selected Security Groups Only**. The selection box is enabled. For more information about security groups, see the "Security" chapter of this book. To move selected groups from the **Security Groups** box into the **Apply Rule to these Security Groups** box, use the arrows. The business rule affects only those groups you move into this box.

9. To save the new rule, click **OK**. You return to the Business Rules page. The new rule now lists in the grid.

▶ **Create an adding actions rule**

You can create rules"User Defined Rules" on page 122 to activate when your users add selected action records.This procedure demonstrates how to create a rule to display a warning when a user adds an action to a constituent who does not want to receive phone calls.

Scenario: You need to create a business rule specifying that a warning appear if an action is being added to a constituent who does not want to receive phone calls.

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, under **User defined rules**, select **Action**. The Adding Action Rules grid appears.
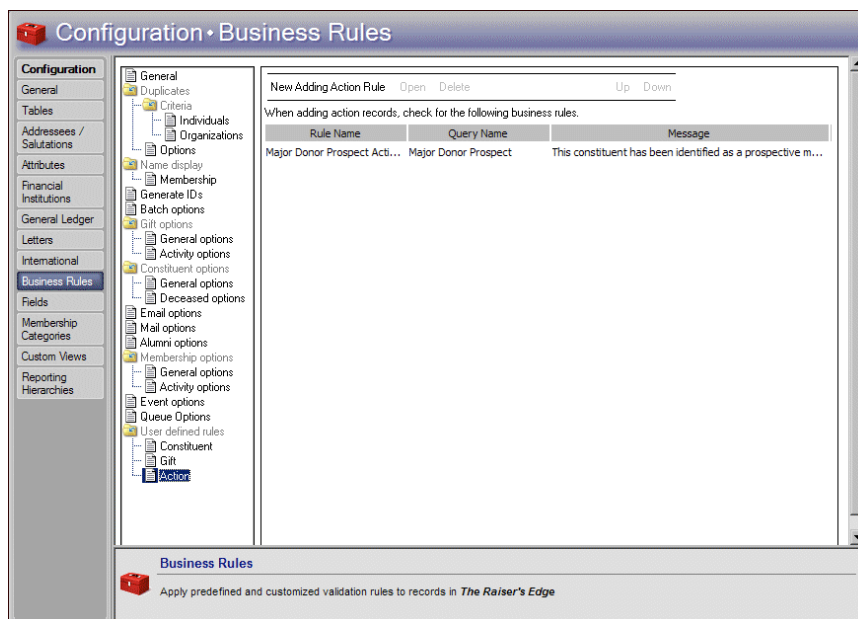
Note: All user defined business rules are based on constituent queries. Constituent queries contain all the available criteria fields available in other types of queries.

In the grid, any rules you defined appear. **Rule Name** displays the name assigned the rule, **Query Name** displays the query on which the rule is based, and **Message** displays the text that appears when the rule is activated.

4. On the action bar, click **New Adding Action Rule**. The New Rule for Adding Actions screen appears.

5. In the **Rule name**, enter "Do Not Phone Warning" to identify the new rule in the grid on the Business Rules page.

Warning: We recommend you base your rules on dynamic queries. Dynamic queries automatically update to include records you add after you create the query. When you base your rule on a dynamic query, you ensure that any record meeting the criteria triggers the rule, regardless of when the record was added. Rules based on static queries may not activate for all records that meet the criteria you establish.

6. In the **Query name** field, enter the name of the query on which to base the rule, or click the binoculars to find a query. You can select any saved dynamic or static constituent query, or create a new one. Queries are ways of filtering and extracting information from the program.

    We recommend you base your rules on dynamic queries. Dynamic queries automatically update to include any new records you add that meet the query criteria. For more information about how to create a query, see the "Query" section of the *Query & Export Guide*. For this rule, select a dynamic constituent query that includes only those constituent records with the solicit code "Do not phone".

7. In the **Message** box, enter the text to appear when the new rule executes. For this rule, the text reads "This constituent does not want to receive phone calls. Please make sure the action you are assigning is not a phone call."

Note: If a user is in more than one security group, and at least one group is affected by a rule, the rule executes for that user.

8. To apply the rule to only selected security groups, mark **Apply Rule to Selected Security Groups Only**. The selection box is enabled. For more information about security groups, see the "Security" chapter of this book. To move selected groups from the **Security Groups** box into the **Apply Rule to these Security Groups** box, use the arrows. The business rule affects only those groups you move into this box.

    Because you want this rule to apply to all users, leave **Apply Rule to Selected Security Groups Only** unmarked.

9. To save the new rule, click **OK**. You return to the Business Rules page. The new rule now lists in the grid.

"Edit a user defined rule" on page 129

"Delete a user defined rule" on page 129

▶ **Edit a user defined rule**

You can edit a rule you already created. For example, you can change the name of the rule or the query on which the rule is based. This procedure demonstrates how to change an action rule that specifies a warning appear when an action is added to a constituent who does not want to receive phone calls.

> *Scenario:* You decide to include constituents who do not want to receive mailings in your "Phone Call Warning" rule for actions.

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, under **User defined rules**, select **Action**. All action rules you defined list in the grid.

4. In the grid, select **Phone Call Warning** in the **Rule Name** column.

5. On the action bar, click **Open**. The Do Not Phone Warning screen appears.

6. In the **Rule name** field, select "Do Not Phone or Mail Warning."

7. In the **Query name** field, use the binoculars to select or create a dynamic constituent query that includes only constituents with the solicit code "Do not phone" and/or "Do not mail".

Note: To make a line break in the **Message** field, press CTRL + ENTER on your keyboard. When you press ENTER by itself, the program attempts to save and close the rule.

8. In the **Message** field, change the text to read "This constituent does not want to receive phone calls or mailings. Please make sure the action you are assigning is not a phone call or mailing."

9. To automatically save your changes, click **OK**. You return to the Business Rules page.

▶ **Delete a user defined rule**

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, under **User defined rules**, select the type of user defined rule you want to delete.

4. In the grid, select the rule to delete.

5. On the action bar, click **Delete**. A verification message appears.

6. To delete the rule, click **Yes**. You return to the grid, where the rule no longer appears.

System Access Options

Note: To comply with the Payment Card Industry Data Security Standard (PCI DSS), users must change their passwords at least every 90 days.

The Raiser's Edge requires the use of strong and complex passwords. Passwords are case-sensitive and require numeric and alphabetic characters. Passwords can have up to 50 characters but must have a minimum of eight characters. For additional security, you can select to require users to change their passwords on a routine basis such as every 90 days. New passwords entered by users cannot match one of the last four passwords used by the user. For information about how to change passwords, see "Passwords" on page 172.

To further secure access to your database, *The Raiser's Edge* automatically locks out a user account after a specified number of failed login attempts. To prevent further attempts, a locked user account remains locked for a specified time period. You must lock out the account for at least 30 minutes, or until a Supervisor user unlocks the account.

To help protect your data, *The Raiser's Edge* automatically logs out a user when a session is idle for 15 minutes. To activate the workstation, the user must enter the password again. You can select whether to enable this inactivity time-out for all users or only Supervisor users.

▶ **Configure system access options**

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

2. Click **Business Rules**. The Business Rules page appears.

3. From the tree view, select **System access options**. The system access options appear.
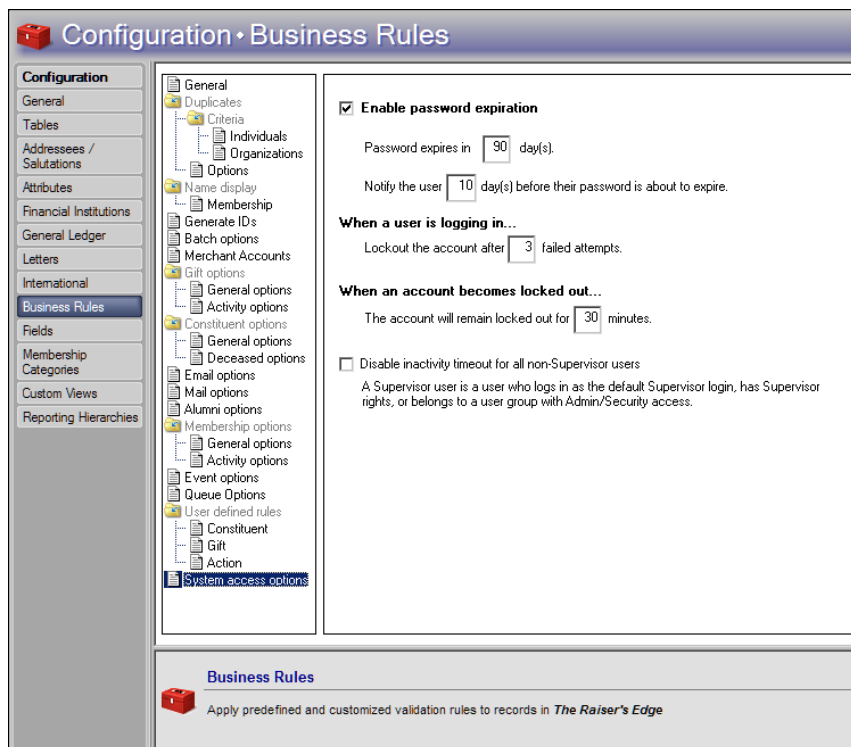
Note: When you enable password expiration, users automatically receive rights to change their passwords.

4. Select whether to require users to change their passwords periodically. To require users to change their passwords, mark **Enable password expiration**.

5. If you mark **Enable password expiration**, enter the number of days to allow users to use a password before it expires and how many days in advance to notify the user before the password expires.

6. Under **When a user is logging in**, enter the number of failed attempts to allow before the program locks the user account.

7. Under **When an account becomes locked out**, enter the number of minutes to prevent further login attempts on a locked user account.

Note: A Supervisor user is a user who logs in as the default Supervisor login, has Supervisor rights, or belongs to a user group with Admin/Security access.

8. To help protect your data, *The Raiser's Edge* automatically logs out a user when a session is idle for 15 minutes. To enable this inactivity time-out for only Supervisor users, mark **Disable inactivity timeout for all non-Supervisor users**.

    When you leave this page, the program automatically saves your changes.

Fields

Note: Only users with Supervisor security rights have access to Fields.

Fields are areas in which you enter information in *The Raiser's Edge*. You can rename fields. For example, if you do not want to track **Ethnicity**, you can change the name of the field to **Status** and use it to track other information. You can also change the way the word "Spouse" displays throughout the program. For example, you may want to substitute "Life Partner".

You can change field status from optional to required, so that a field must have an entry before you can save a record. You can hide fields you do not use so they are not visible to your users. You can also change fields from standard to lookup. Lookup fields are similar to tables. You can define entries for a lookup and when you place the cursor in the field, you can press **F7** on your keyboard to view a list of entries. Making a field a lookup can help standardize your entries and increase the consistency and speed of your data entry. You can also use a procedure for easily "Find a field" on page 133.

▶   **Define field characteristics**

    You can rename fields, and make them required, hidden, or lookups. You can change the way the word "spouse" displays throughout the program.

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

2. Click **Fields**. The Fields page appears.

Warning: When you rename a field, the original field name still appears in reports.

3. From the Categories box, select the field category to define. The fields for the selected category appear in the **Field Options** grid.

4. In the grid, the **Field** column displays the names of the fields. To change the display name of a field, enter a new name in the **Display As** column on the same row.

5. To make a field required, mark **Required**. Before a record can be saved, a required field must contain information.

Warning: If you make **Membership ID** a required field, no memberships can be globally added. Because the ID must be unique, the field is disabled in the **Globally Add Records** link of *Administration*.

If you make a field required, the program verifies the new required field does not prevent a security group from adding a record. For example, a group may not have view rights to a tab on which the field is located. If this is the case, a message appears to ask whether to make the field required.

6. To hide a field, mark **Hidden**. A hidden field may contain information, but it does not appear on a record. You can use this checkbox to hide fields your organization no longer uses.

Note: A field you make into a lookup functions like a table. You can define entries for a lookup field to make data entry quick and consistent.

7. To make a field a lookup field, mark **Lookup**. You can add, edit, and delete entries for a lookup field. When you place the cursor in a lookup field, you can press **F7** on your keyboard to access a screen where you can add, edit, and delete entries.
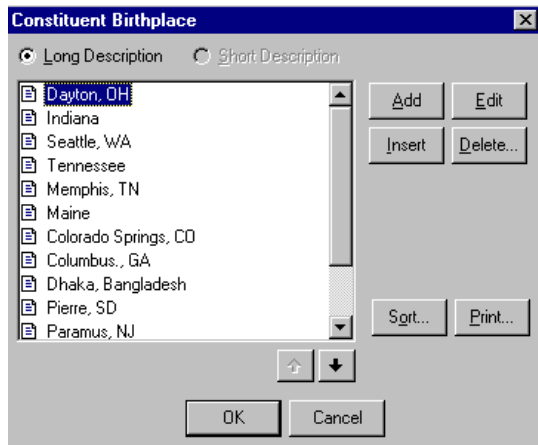
Lookups are virtually identical to tables. The only difference between the two is lookup fields do not have the down arrow in them as do fields with tables. When you make a field a lookup, you can view, add, edit, and delete entries for the field. Define standard entries to make your data entry more consistent. The field then appears in the list of tables in the **Tables** link of *Configuration* and in *Administration* in the **Code Tables** section of **Security**. Security rights to add, edit, and delete entries for the new lookup are automatically granted to all users.

8. At the bottom of the Fields page, in the **Display the word 'spouse' as** field, enter another word (or words) to use as "spouse" throughout the program, if necessary.

▶ **Find a field**

Instead of scrolling through the list of fields, you can use this procedure to quickly locate any existing field in the program for editing or viewing.

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

2. Click **Fields**. The Fields page appears.
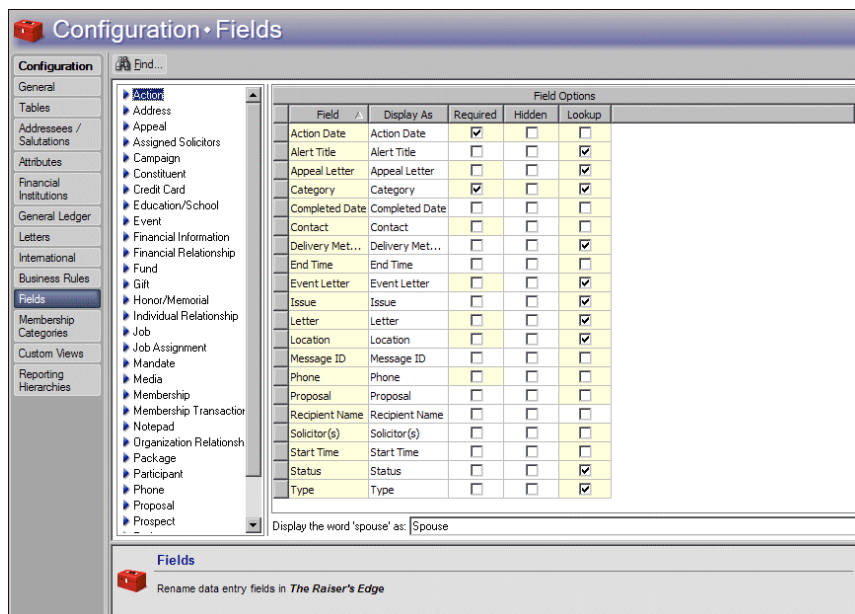
3. On the action bar, click **Find**. The Find screen appears.

4. In the **Field** field, select whether to base your search on the Field or Display as.

5. In the **Find what** field, enter the name of the field to find.

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

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

8. To find the first match that meets your search criteria, click **Find First**. in The **Field Options** grid on the Fields page, the match is highlighted.

9. To find additional entries, click **Find Next** on the Find screen.

Membership Categories

> **Note**: Membership categories and Donor categories are not the same. Membership categories are available only if you have the optional module *Membership Management* and define levels of giving necessary to gain membership in one of your categories or clubs. Donor categories define cumulative giving clubs or levels.

If you have the optional module *Membership Management*, the **Membership Categories** button appears. A membership category defines the level of giving required for a constituent to gain membership in one of your categories or clubs. For example, you can establish categories for Lifetime Member, Corporate Member, and Individual Member. You can define membership categories based on program titles, minimum and maximum dues amounts, and number of members.

Want to know about "Membership Category Record" on page 134? About "Manage Membership Categories" on page 135?

Membership Category Record

The membership category record consists of several tabs:

General Information tab. On the General Information tab, enter information such as the category name and establish membership dues required to qualify for this category. "Define general information for a membership category" on page 135

Default Benefits tab. On the Default Benefits tab, enter the benefits, such as discounts, member newsletters, or t-shirts, that you give constituents who qualify for membership in the category. "Establish default benefits for a membership category" on page 137

Default Settings tab. On the Default Settings tab, enter defaults for expiration dates, memberships linked to gifts, and receipt amounts. "Establish default settings for a membership category" on page 138

Renewal Information tab. On the Renewal Information tab, establish a wide variety of default information for membership renewals such as when to drop lapsed memberships and when to print renewal notices. "Assign renewal information for a membership category" on page 141

Want to know about "Manage Membership Categories" on page 135?

Manage Membership Categories

You can add new membership categories, edit and delete existing ones, and copy information from categories you already established into new ones to save time. You can easily find membership categories if you have so many that they all cannot be viewed in the grid at the same time. You can determine the order categories list in the grid and place your most frequently used categories at the top of the list to save time.

Managing membership categories consists of these procedures:

▶ **Define general information for a membership category**

You can name a category, specify a program for it, and specify how many members are allowed per membership. You can include subcategories with the category and determine a default dues level and minimum and maximum dues for the new category.

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

2. Click **Membership Categories**. The Membership Categories page appears.
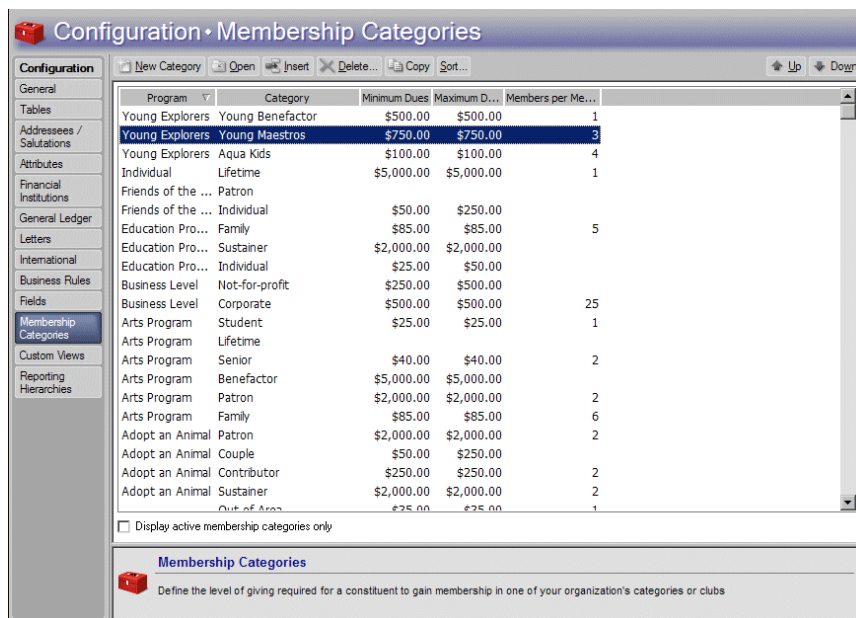
Note: When you create and save a new membership category, it appears at the bottom of the grid on the Membership Categories screen. To place a new category on a specific line, select an existing category and click **Insert**. Follow the same steps to create the category as when you use **New Category**. When you save the new category, it appears in the grid above the selected category.

3. On the action bar, click **New Category**. The New Membership Category screen appears.

4. Select the General Information tab.

5. In the **Category** field, name the category you are entering. For example, you can create categories for "Benefactor", "Student", and "Friend".

6. To automatically default the **Print renewal notices** checkbox on a membership record to unmarked when you enter this membership category and program on a membership transaction, mark **Lifetime membership**.

Note: **Program** is like an umbrella for **Categories**. For example, a zoo can have categories of Little Friend, Best Buddy, and Junior Keeper, all under the Kid's Club program.

7. In the **Program** field, enter the program the specified category belongs in. For example, an animal assistance league can have categories of "Benefactor" and "Gold Club Member" in both the "Adopt an Animal" and "Feed the Animals" programs. Click the down arrow to list the available programs as defined on the Tables page or press **F7** on your keyboard to add a new entry if you have security rights to do so. This field is not required and does not have to be unique, but the combination of this and your entry in the **Category** field must be unique.

8. To determine the maximum number of members a membership can have for this category and program, mark **Max. members per membership record** and enter the number in the corresponding field. For example, you can specify that a "Lifetime Member" receives as many as four memberships for use by family members.

   The maximum number of members you enter here is only a default and can be exceeded. Using the "Lifetime Member" example above, if you enter a fifth joint member on a membership in this category, a warning appears, but you can add the member anyway.

9. To create subcategories, click **Subcategories**. The Membership Subcategories screen appears so you can add, edit, and delete entries. Examples of subcategories could include "College" and "High School" under the category "Student".

10. On the New Membership Category screen, the **Available Subcategories** box lists all defined subcategories. Use the arrows to move the subcategories to add to the new membership category into the **Include These Valid Subcategories** box. Only subcategories in this box appear for the Category/Program combination when you add a transaction for the membership to a constituent record.

11. Under **Membership Dues**, the information used to determine defaults when a user enters a membership transaction on a constituent record appears. In the **Dues level** field, enter any alphanumeric amount to indicate the dues level. Information in this field is for informational purposes only. It does not affect reports or defaults when adding a membership transaction.

12. In the **Minimum dues** field, enter the minimum currency amount to qualify for the membership category.

13. In the **Maximum dues** field, enter the maximum currency amount to qualify for the membership category.

14. To indicate a category is not currently used by your organization, mark **Membership category is inactive**. If you mark both this checkbox and **Display active membership categories only** on the Membership Categories screen, you can ensure that a category is not used further on any records without deleting it from your database.

15. Click **Save** on the toolbar and proceed to the next tab on the record or, to save the record and return to the Membership Categories page, click **Save and Close**.

▶ **Establish default benefits for a membership category**

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

2. Click **Membership Categories**. The Membership Categories page appears.

3. On the action bar, click **New Category**. The New Membership Category screen appears.

4. Select the Default Benefits tab.

5. In the grid, enter defaults for benefits received for membership in the new category and establish the associated value of these benefits.

a. In the **Benefit** column, select or enter the benefits associated with the membership, such as a coffee mug, tote bag, and t-shirt.

Note: When you edit a **Benefits** table entry, any default benefit that you already assigned to a membership category is not affected. For example, if you enter a default benefit with a unit cost of $5 for an appeal, when you enter gifts on that appeal, the benefit defaults on the gift with a unit cost of $5. If the cost of the benefit rises to $6 and you update the **Benefits** table, the unit cost does not change on gifts that already have the benefit, only on new gifts added to the category.

b. In the **Count** column, enter the number of times the member receives each benefit. For example, if the category entitles a member to two t-shirts, enter "2".

c. In the **Unit Cost** column, enter the currency value of each benefit. This field defaults to a value based on the table entry in the **Benefit** column (as established in the **Tables** link), but you can overwrite the default value.

In the **Total Benefit Value** column, the program automatically multiplies the number of units by the benefit cost and displays the total value.

d. In the **Sent/Fulfilled** column, enter the date the member receives each benefit.

e. In the **Comments** column, enter an additional text note about each benefit.

6. To indicate which constituent should get the benefit for gifts of membership, select **Primary Member** or **Donor**.

7. In the **Notes** box, enter additional information about the benefits for the membership category, such as the name of the shop that screen printed your t-shirts or how many tote bags you purchased to give as benefits.

8. Click **Save** on the toolbar and proceed to the next tab on the record or, to save the record and return to the Membership Categories page, click **Save and Close**.

▸ **Establish default settings for a membership category**

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

2. Click **Membership Categories**. The Membership Categories page appears.

3. On the action bar, click **New Category**. The New Membership Category screen appears.

4. Select the Default Settings tab.

5. Under **Card/Renewal Defaults**, in the **Default renewal card status to** field, select a default card status for when you renew a membership. You can select "Not Printed", "Do Not Print", "Lost", or "Printed".

6. In the **Default no. of cards to print** field, enter the number of memberships to which a category member is entitled.

7. Under **Expiration Defaults**, in the **Default 'Expires' to** field, select the default expiration date for the membership.

Note: To enter an expiration date on each membership card individually, select "No default" as your entry in the **Default 'Expires' to field**.

- To enter each expiration date individually, select "No default".

- To default the expiration to the first of the next month for a membership that expires on any day other than the first in a month, select "Beginning of Month". For example, if a membership starts on 2-15-2007 and is supposed to last twelve months, it normally expires on 1-15-2008. If you select this option, the expiration defaults to 2-1-2008.

- To default the expiration to the last day of the current membership month for a membership that expires on any day other than the last in a month, select "End of Month". For example, select this option if your organization only drops memberships or sends out expiration notices at the end of the month. For example, if the membership starts on 1/15/2007, the expiration defaults to 1/31/2008 if Category is set at twelve months and "End of Month" is selected as the default expiration date.

- To have every membership expire at the end of the annual (not fiscal) quarter in which it began, select "End of Quarter".

- To have every membership expire on the same month and day as it began (the 'Joined on,' 'Renewed on,' or in some cases 'Rejoined on' date), select "Same Month/Day as Cycle Start Date".

- To have every membership expire on the same month, day, and year, select "Specific Date" and enter the date in the provided field. For example, you can make all memberships expire at the end of the year, so even if a member joined, renewed, or rejoined in June or July, the expiration date is always 12/31. If you select this option, you must change the year in the corresponding field entry at the beginning of each new membership year, whether it be calendar or fiscal.

Note: You must make an entry in the **New memberships expire after** and **Renewed memberships expire after** fields before you can save a membership category; however, the entries can be overwritten on individual records.

8. Select a default for the amount of time that **New memberships expire after**. You must make an entry here before you can save the new category, but users can override the default when they enter membership transactions. If you select "Specific Date" in the **Default 'Expires' to** field, this field is disabled.

9. Select a default for the amount of time that **Renewed memberships expire after**. This is required to save a category and can be overwritten. If you select "Specific Date" in the **Default 'Expires' to** field, this field is disabled.

10. Select a default for the amount of time **Rejoined memberships expire after**. This can also be overwritten but is not required because your organization may not ever drop memberships. If you select "Specific Date" in the **Default 'Expires' to** field, this field is disabled.

New and renewed memberships are separated because, for example, you may want to give new members a thirteen month membership as a bonus for joining, but renewed memberships last the standard twelve months.

Note: Default sets can contain default entries for almost every field on a record. When you load a default set into a record, the values entered for the set can automatically default into the record. This saves you time during data entry. For more information about default sets, see the "Program Basics" chapter of the *Program Basics Guide*.

11. Under **Default Information For Memberships Linked to Gifts**, specify the gift field default set. To select an existing default set or create a new one, click **Gift Defaults**. To select a default set, enter the name directly into the field. When you leave the field, the program searches for a match. If a match is found, the link is made. If a match is not found, a message appears to ask whether to create a new default set. If you specify a valid default set, the magnifying glass is available to view details of it.

12. Under **Default Receipt Amount Options**, specify whether to default the receipt amount of memberships linked to gifts based on the gift amount and benefits received or another amount.

- To default the receipt amount of a membership linked to a gift based on the membership benefits loaded into the gift record Benefits grid, select **Gift Amount - Benefits**.

- If you do not want a default receipt amount, select **Do not default receipt amount** option. This affects only gifts linked through membership.

• To default another amount as the receipt amount of a membership linked to a gift, select **Other Amount** and enter an amount. If this field is already populated in the gift record, it is not overwritten by the default values you set here.

13. Click **Save** on the toolbar and proceed to the next tab on the record or, to save the record and return to the Membership Categories page, click **Save and Close**.

▶ **Assign renewal information for a membership category**

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

2. Click **Membership Categories**. The Membership Categories page appears.

3. On the action bar, click **New Category**. The New Membership Category screen appears.

4. Select the Renewal Information tab.

5. In the **Drop this membership after being lapsed for** field, enter a grace period (the amount of time a membership can be lapsed before it is dropped). Enter a number up to 99 followed by a selection of Day(s), Week(s), Month(s), or Year(s) from the table.

6. In the **Regular Renewal Notice Information** grid, enter the renewal notices to use with the membership category.

    a. In the **Letters** column, select which letter to send for the renewal notice.

    b. In the **Comments** column, enter additional comments to include with the renewal.

    c. In the **No., Frequency**, and **Before/After** columns, enter the number of days, weeks, months, or years before or after expiration that a renewal notice should be sent.

7. In the **Renewal Notice Information When There Are Gifts of Membership** grid, enter the renewal notices to use with the membership category when there are gifts of membership. In the **Send to** column, select whether the member, the giver of the gift of membership, or both receive renewal notices.

8. To save the record and return to the Membership Categories page, click **Save and Close** on the toolbar.

▶ **Edit a membership category**

You can change a membership category you have already established, such as to change the renewal information or default benefits for a membership category. This procedure demonstrates how to assign a new benefit for a selected category and program.

> *Scenario:* Your museum wants to assign a new benefit to the Lifetime category, Individual program. You want to give four free admission passes as a benefit for this category.

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

2. Click **Membership Categories**. The Membership Categories page appears.

3. In the Membership Categories grid, select the Individual program, Lifetime category.

4. On the action bar, click **Open**. The Individual - Lifetime screen appears.

5. Select the Default Benefits tab.

6. By default, a blank row appears at the bottom of the grid. Scroll to the bottom of the grid and in the blank row, enter "Free Admission" as the **Benefit**.

7. In the **Count** column, enter 4.

8. In the **Unit Cost** column, enter the amount $8. The **Total Benefit/Value** column entry defaults to $32.

9. Because you have not yet given out the passes, leave the **Sent/Fulfilled** column blank.

10. In the **Comments** column, enter any important comments about the benefit.

11. On the toolbar, click **Save and Close**. You return to the Membership Categories page.

▶ **Delete a membership category**

> **Note**: To ensure a category is not used further on any records without deleting it from your database, mark **Membership category is inactive** on the General Information tab and **Display active membership categories only** on the Membership Categories screen.

You can remove a membership category from your database. You can delete only categories that are not currently in use on any records.

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

2. Click **Membership Categories**. The Membership Categories page appears.

3. In the Membership Categories grid, select the category to delete.

4. On the action bar, click **Delete**. A verification message appears.

5. To delete the category, click **Yes**. You return to the Membership Categories page. In the grid, the deleted category no longer appears.

▶ **Copy information from a membership category into a new membership category**

You can use the information from an existing category to create a new membership category. If two of your categories are similar, this option can save time as you create your categories.

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

2. Click **Membership Categories**. The Membership Categories page appears.

3. Select the category from which you want to copy information.

4. On the action bar, click **Copy**. The New Membership Category screen appears with information from the selected category automatically filled in.

5. Before you can save the category, change either the **Program** or **Category** field to make the new category unique.

6. On the toolbar, click **Save and Close**. You return to the Membership Categories page.

▶ **Find a membership category**

You can find an established membership category. If you define numerous categories, you may find it easier to locate a specific category this way rather than scroll through all the entries in the grid.

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

2. Click **Membership Categories**. The Membership Categories page appears.

3. On the action bar, click **Find**. The Find screen appears.

4. In the **Field** field, select to base your search on either the Program, Category, Minimum Dues, or Maximum Dues.

5. In the **Find what** field, enter the name or several letters of the membership category you want to find.

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

7. If you want the search to match any capitalization in the table name, mark **Match case**.

8. To find the first match that meets your search criteria (as it appears in the grid, not alphabetically), click **Find First**. The entry appears highlighted in the grid.

9. To find any additional entries that match your **Find what** criteria, click **Find Next**.

▶ **Sort and move membership categories in the grid**

Tip: You can move your most frequently used entries to the top of the grid. This saves time scrolling through your less used entries during data entry.

You can arrange the order categories list in the grid. You can place your most popular entries at the top of the grid to save time scrolling through the entries.

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

2. Click **Membership Categories**. The Membership Categories page appears.

3. In the action bar, click **Sort**. The Sort Membership Categories screen appears.
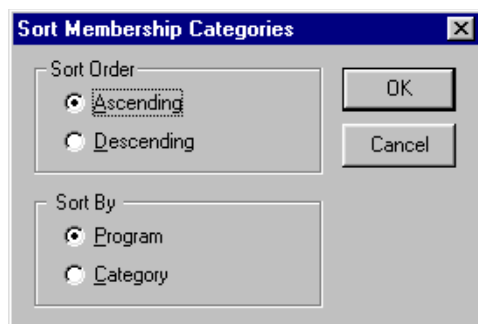
4. Under **Sort Order**, select the order in which to display the categories.
   • To display the categories in alphabetical order from A-Z, select **Ascending**.
   • To display the categories in reverse order from Z-A, select **Descending**.

5. Under **Sort By**, select how to sort the entries.
   • To sort the entries by program, select **Program**.
   • To sort the entries by category, select **Category**.

6. To move a selected entry up or down one line in the Membership Categories grid, use the up and down arrows.

▶ **Print membership categories**

You can print a list of all your membership categories or a detailed profile of each category to keep for your records.

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

2. Click **Membership Categories**. The Membership Categories page appears.

3. To print a list of the names of all the categories in the grid, in the Membership Categories grid, right-click anywhere and select **Print**, **Grid only**.

   To print a detailed report for a category including default benefit and renewal information, select the category in the grid, right-click, and select **Print**, **Membership Category Profile**.

Interfund Entries

If you have Blackbaud's *General Ledger* and have established a link between it and *The Raiser's Edge* from the **General Ledger** link of *Configuration*, the **Interfund Entries** button appears. You can specify *General Ledger* transfer accounts and quickly access and enter them into the GL Distributions grid on fund records.

If the first two numbers of a *General Ledger* debit and credit account are different, they belong to different *General Ledger* funds. In this case, you must specify a transfer account. The interfund transfer ensures that posted debits and credits associated with a gift are balanced by *General Ledger* fund when the debit is to one fund and the credit to another. For example, if you post a debit to the *General Ledger* Playground Fund and a credit to the *General Ledger* Operating Fund both from the *The Raiser's Edge* General Fund, an interfund entry is needed to create an offsetting or balancing credit to the *General Ledger* Playground Fund and a balancing debit to the *General Ledger* General Operating Fund.

To access account numbers directly from the *General Ledger* database, click the binoculars or press **F7** on your keyboard. The accounts you define here appear in the list of entries when you click the down arrow in the **Interfund** column of GL Distribution grids.

▶ **Add an interfund entry**

You can specify a transfer account to link debit and credit accounts from different *General Ledger* funds.

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

2. Click **Interfund Entries**. The Interfund Entries page appears.

3. In the **Interfund Entry** column, enter a name of up to thirty characters. This name appears in the list of possible entries when you click the down arrow in the **Transfer** column of a GL Distributions grid on a fund record.

4. In the **Source Account** and **Destination Account** columns, click the binoculars to search the *General Ledger* database for account numbers. The account descriptions appear when you enter an account number. The descriptions are defined in *General Ledger* and cannot be edited in *The Raiser's Edge*. The source and destination account numbers must be different. If you select the same account numbers, a message appears.

To return to the Interfund Entries page, click **OK**.

> **Note**: You can select which character to use as a placeholder for any missing digits in a *General Ledger* account number on the Records tab of User Options.

5. If you click the down arrow in the **Source Account** or **Destination Account** columns, a dropdown box appears. The contents of the box break down a *General Ledger* account number by segment.

Segment	Value	Description
Fund	01	UNRESTRICTED O...
Account Number	213200	
Expense Category	05	Equipment Repair
Department/Cost...	01	Administration

The **Segment** column breaks the account number into *General Ledger* fund (first two numbers), account number (next six numbers), expense category (the following two numbers), and Department/Cost (last two numbers). All the segments together make a complete account number. In the **Value** column, enter a value for each segment. The **Description** column displays the description of that value entered in *General Ledger*.

When you leave the Interfund Entries page, the program automatically saves the new interfund entry.

▸ **Edit an interfund entry**

You can change an interfund entry. For example, you may want to change the transfer account used between two *General Ledger* funds.

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

2. Click **Interfund Entries**. The Interfund Entries page appears.

3. Select the entry to change.

4. Enter a new **Source Account** or **Destination Account** number.

When you leave the Interfund Entries page, the program automatically saves your changes.

‣ **Delete an interfund entry**

You can delete interfund entries that are not in use in any GL Distributions. Deleting the information from **The Raiser's Edge** does not affect the information in **General Ledger**. If you attempt to delete an entry that is currently in use in a GL Distribution, a message informs you that it cannot be deleted.

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

2. Click **Interfund Entries**. The Interfund Entries page appears.

3. In the grid, click the box on the far left of the entry to delete. The entire row highlights.

4. Press **DELETE** on your keyboard. A verification message appears.

5. To delete the interfund entry, click **Yes**. You return to the Interfund Entries page. The selected entry no longer appears in the grid.

Reporting Hierarchies

With Reporting Hierarchies, you can group funds into hierarchies that are independent of the Giving Hierarchies you establish in campaign records. For more information about Giving Hierarchies, click **Records**, **Giving Hierarchy** in the Contents tabsee the Giving Hierarchies chapter of the *Campaigns, Funds, & Appeals Data Entry Guide*.

A Reporting Hierarchy provides a framework to report on donations and progress against goals (in both summary and in detail) at any level in the hierarchy or for any category within the hierarchy. For example, your Development Office may need to provide the Board of Directors with reports that include gift data for funds in **The Raiser's Edge** grouped by various characteristics of the funds, such as scholarship funds. These characteristics and the groupings based on them may be completely independent of the campaign or campaigns to which the funds belong. Reporting Hierarchies provide you with the ability to create these custom hierarchical groupings and use them as the basis of specific reports.

On the Reporting Hierarchy page, you can create and modify Reporting Hierarchies. After you create a Reporting Hierarchy, you can base Campaign Fund Analysis or Campaign Gift Analysis reports on it.

A Reporting Hierarchy consists of groups of funds you add and "nest" within it. Groups can be created based on a query, fund or fund category filters, and inclusion or exclusion attributes — a group can even consist of a single fund. The order in which you nest the groups determines how results are tallied for the hierarchy. For more information about this, see "Use Reporting Hierarchies" on page 152.

▶ **Create a reporting hierarchy**

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

2. Click **Reporting Hierarchies**. The Reporting Hierarchies page appears.
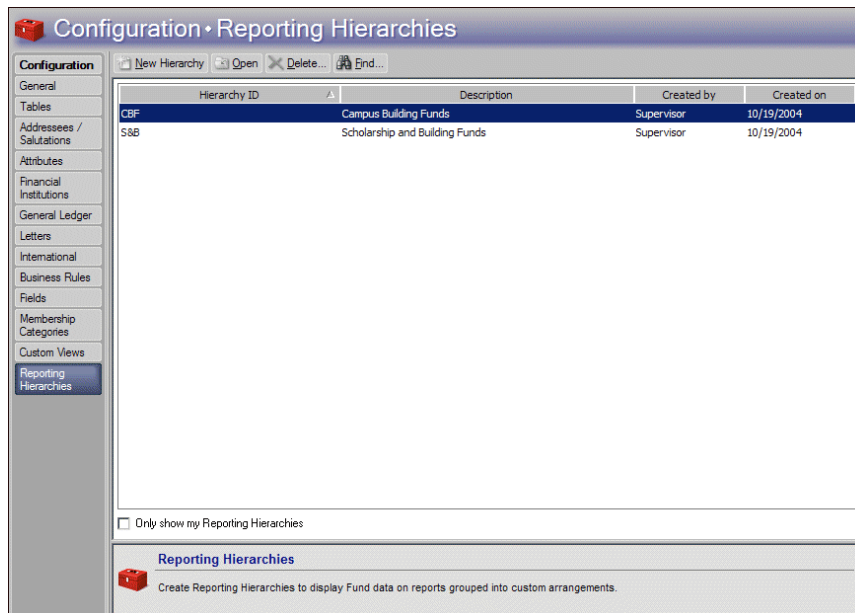
In the grid, any previously created Reporting Hierarchies appear. To view only the hierarchies you created, mark **Only show my Reporting Hierarchies** at the bottom of the page.

3. On the Action bar, click **New Hierarchy**. The New Reporting Hierarchy screen appears.
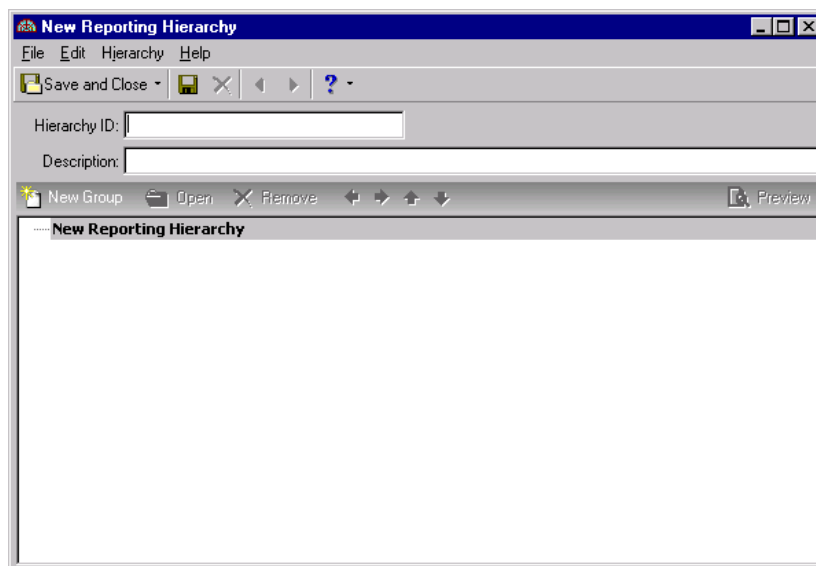
4. In the **Hierarchy ID** and **Description** fields, enter an ID and a description to identify the new hierarchy in *Configuration* and on reports. When you open a saved hierarchy, the ID appears in the title bar.

5. To combine gift totals for a group of funds, create groups of funds.

a. In the action bar, click **New Group**. The New Group screen appears.

Warning: Before you can save a hierarchy, the lowest level fund group in any reporting hierarchy must have criteria defined.

b. Enter a **Group Name** and, if necessary, a **Goal** amount.

c. To select which funds to include in the group, click **Include**. You can select to include all funds, only funds that appear in a specific fund query, or only funds associated with gifts that appear in a specific gift query.

d. In the **Filters** grid, filter the funds included in the group. The records you select must meet all criteria selected on this screen. You can include all records or selected records for each selection in the Filters grid. The Filters grid contains three columns: **Filters**, **Filter Option**, and **Selected Filters**.

The **Filters** column lists information you can use to narrow the funds included in the group. The **Filters** column selections are Funds, Fund Categories, and Campaigns.

In the **Filter Option** column, for each selection in the **Filters** column, select which records in your database to include. The records to include must meet the criteria you select elsewhere on this screen. In the **Filter Option** column, select whether to include all records or selected records.

If you select "Include All" in the **Filter Option** column, all records for the **Filters** column selection which meet the group's criteria appear in the results. For example, for the **Filters** column selection **Fund Categories** you can select "Include All" in the **Filter Option** column. All funds in fund categories meeting the criteria specified elsewhere on this screen will appear in the group. If you choose "Selected" in the **Filter Option** column, the **Selected Filters** column is enabled.

The **Selected Filters** column displays the records you select to include in the group. To enter information in the **Selected Filters** column, select "Selected" in the **Filter Option** column. Click the binoculars to open the selection screen. From this screen, you can use the arrow keys to move your choices from the box of selections on the left to the **Include these Funds** box on the right. The group includes the records you select in the **Selected Filters** column that meet all the criteria.

e. Under **Attributes**, select whether to **Include** or **Exclude** funds with attributes you specify.

If you mark **Include Funds with these Attributes**, the Include grid is enabled. Select the attributes of the fund records to appear in the group.

If you mark **Exclude Funds with these Attributes**, the Exclude grid is enabled. Select the attributes of the fund records to not appear in the group.

f. To save the group, click **OK**. You return to the New Reporting Hierarchy screen. The new group appears.
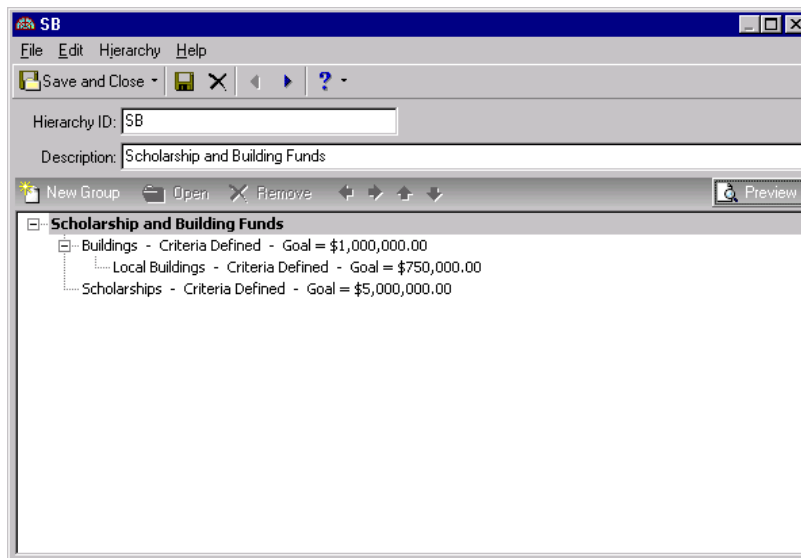
6. The hierarchy defaults into Design view. To see the funds that make up each group, click **Preview** in the action bar.
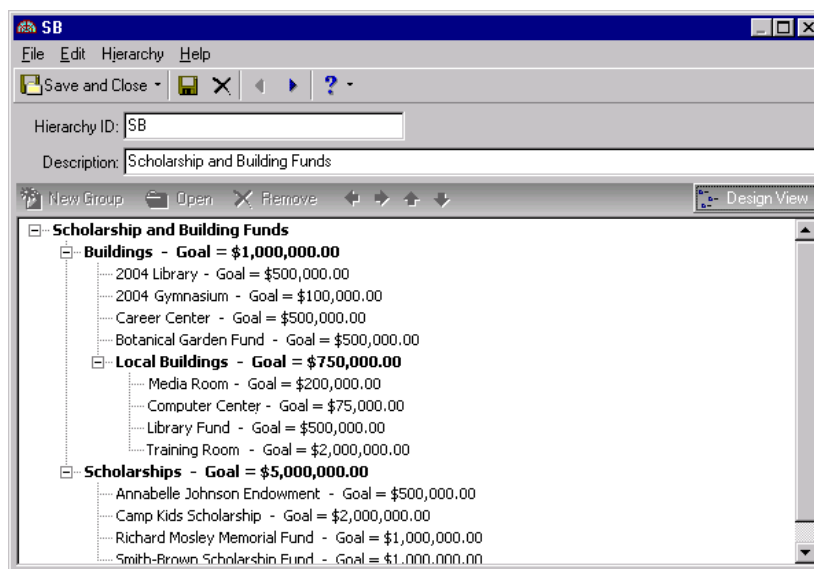
To continue building the Reporting Hierarchy, click **Design View**.

The lowest level fund groups in any Reporting Hierarchy must have some sort of filtering criteria defined before you can save a hierarchy. In other words, the lowest level in the hierarchy cannot consist of all your funds.

> **Note**: If you remove a group from the hierarchy and the group is parent to other groups, a warning appears. You can remove just the parent and promote the child groups to the level occupied by the group you remove, or you can remove the parent along with its child groups.

7. To establish the parent and child relationships among groups in your hierarchy, use the arrows on the action bar. For more information about how the relationship between child and parent groups of funds in the hierarchy affects summary totals, see the next section "Use Reporting Hierarchies" on page 152.

8. To save the new Reporting Hierarchy, click **Save and Close**. You return to the Reporting Hierarchy page.

Use Reporting Hierarchies

The purpose of a fund group in a Reporting Hierarchy is to provide a sum of gift totals for a group of funds. For example, a "Science Funds" group with criteria that includes all funds associated with the Science Department displays a summary total gift amount for all these funds, as well as the detail gift amounts for each fund included in the group.

The placement of funds in groups determines the summary information that appears for the groups in a Reporting Hierarchy. After you create groups, use the arrows in the action bar to arrange fund groups in a particular order to form the hierarchy.
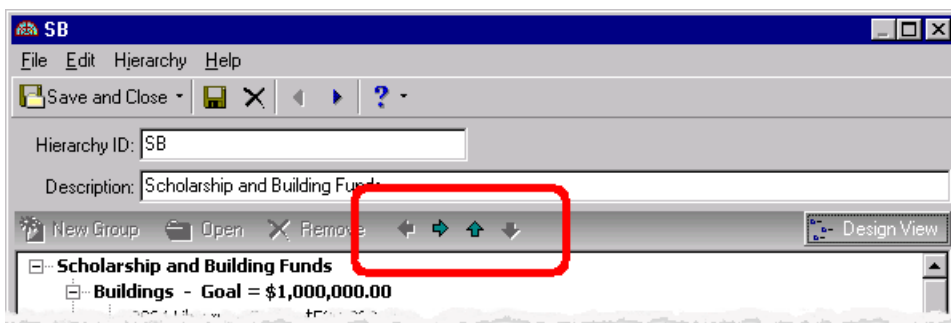
For more information about creating fund groups, see "Create a reporting hierarchy" on page 149.

On the General tab of a Campaign Fund Analysis or Campaign Gift Analysis Report, you can select to base the report on a Reporting Hierarchy.

> **Note**: For more detailed information about creating reports, see the *Reports Guide*.

When you generate a report, funds are offset to indicate their position in the hierarchy and gift totals "roll up" through the hierarchy, so that a gift to a fund in a "child" group is also reflected in the totals for the "parent."

Campaign Fund Analysis

Fund Hierarchy	Total Gifts
SB	$1,433,252.00
Buildings	$815,600.00
Local Buildings	$445,450.00
2004 Library	$28,290.00
2004 Gymnasium	$8,600.00
Career Center	$0.00
Botanical Garden Fund	$408,560.00
Media Room	$37,005.00
Computer Center	$106,225.00
Children's Library Fund	$44,225.00
Training Room	$182,695.00
Scholarships	$617,652.00
CAMP	$41,317.00
RMMF	$136,165.00
SBSF	$395,945.00
JOHNSON	$44,225.00
Hierarchy Totals	**$1,433,252.00**

A total of 11 Fund(s) Listed

When you create the Reporting Hierarchy, fund groups can be nested. For example, a "Science Funds" group may not be assigned any criteria, but it may have child groups for "Physics Funds," "Chemistry Funds," and "Biology Funds" that each have their own criteria to filter out any funds not associated with those departments.

In this case, the default criteria of the "Science Funds" group would be the union of the criteria for its child groups. So, "Physics Funds" would combine the gift totals for each fund associated with the Physics Department, "Chemistry Funds" would combine the gift totals for each fund associated with the Chemistry Department, and "Biology Funds" would combine the gift totals for each fund associated with the Biology Department. Science Funds would then combine the gift totals for funds associated with any of the three departments.

Security

Procedures

Security settings define the level of access your users have to all areas of **The Raiser's Edge**. These settings determine which tabs appear for a user; whether the user can view, add, edit, or delete records; and whether the user can perform various functions throughout the program.

More About Security

Security centers around groups you create. You can customize the security settings for a group and then add members to the group based on the level of access you grant them. For example, you can create a group for your data entry personnel and give the group all rights necessary to view and change information and perform functions related to data entry.

Security is closely linked with *Configuration* to determine how **The Raiser's Edge** manages information. We recommend you limit security access to *Configuration* to only those users with Supervisor rights. You can assign Supervisor rights to any user. Only the Supervisor and those users with Supervisor rights have full access to all areas of the program.

Note: When users log into **The Raiser's Edge**, user names and passwords are not case sensitive.

The Raiser's Edge is shipped with a user name of "Supervisor" and a password of "ADMIN". We recommend you change your Supervisor password immediately and make sure that at least one other person in your organization knows the new password. You can also grant rights to individual users to allow them to change their own passwords.

What is Security?

Security enables you to ensure the consistency, integrity, and confidentiality of your data by limiting access to records and functions to only the users who need it. For example, when you limit view rights for your users, you determine who sees such records as gift amounts from Board Members or sensitive notes and attributes assigned to constituents. By limiting rights to edit data and perform certain functions, you can control which of your users can change and delete important records for your organization.

Security in **The Raiser's Edge** is based on several ideas: object, system, and field level options; inclusion and exclusion criteria; and the assignment of rights by security groups. Although the term "object level security" sounds less widespread than "system level security," of the two, system level security is actually the smaller or more precise level of security. For example, if you deny rights to edit constituent records through object level security, the group cannot edit any constituent records; however, with system level security, you can deny edit rights to only constituent records with certain codes, while allowing rights to all others. A key difference between the two types of security is that object level security does not affect the user's ability to print restricted records in

reports or mailings, but system level security does prevent restricted records from appearing in reports or mailings. You can use field level security to deny access to specific fields on certain records. For example, if you deny rights to credit card information, all fields in the constituent record Credit Card grid are disabled, and credit card information fields are left blank and disabled on gift records. Like object level security, field level security does not affect reports or mailings.

Encrypted Information in The Raiser's Edge

> **Note**: With version 7.81, **The Raiser's Edge** employs AES encryption. When you upgrade from version **7.80**, your 3DES-encrypted data is decrypted and encrypted with AES encryption. If you upgrade from a version prior to **7.80**, the social security numbers, bank account, and insurance policy data that was previously not encrypted is encrypted with AES encryption. With **The Raiser's Edge 7.86**, all credit card numbers are encrypted and associated with token identifiers.

Social security numbers, bank account numbers, and insurance policy numbers are encrypted in **The Raiser's Edge** database. Fields that are encrypted can only be searched for with an exact match. Users cannot use partial matches (such as "begins with," "contains," etc.) for encrypted fields.

Credit card numbers are encrypted and cannot be decrypted. To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), when you enter a credit card number into **The Raiser's Edge**, the program automatically stores the number in the *Blackbaud Payment Service* for security. In the database, a token identifier from the *Blackbaud Payment Service* appears as the credit card number. In **The Raiser's Edge**, only the last four digits of the credit number appear on records, such as on the Bio 2 or Org 2 tab of a constituent record.

For user passwords, a "hash" is used. A hash encrypts the password in a way that cannot be decrypted.

Frequently Used Terms

If you come across an unfamiliar term when you read this or any other chapter in **The Raiser's Edge** documentation, make sure you check the online glossary in the help file. The following terms appear throughout this chapter.

Security Groups. To control security in **The Raiser's Edge**, you create groups with different rights and assign your users to these groups based on how much access to records and functions you want them to have. In addition to the creation of new groups, you can edit the rights for existing ones.

Although each user has a unique password, you can use groups to define the functions that users assigned to a group can perform and the records they can view, add, edit, and delete. For example, to create a group for workers who add new constituent records but do not edit existing constituent records, you can give add rights and deny edit rights to constituent records.

> **Note**: Whenever a user attempts to access a record or function for which he does not have security rights, a message appears to deny authorization.

Object Level Security. Object level security refers to access rights given to a user based on record type. Data entry security is based on object level security. For example, if a user does not have rights to edit campaign records, the user cannot edit campaigns from anywhere in the program. Object level security affects a user in all areas of the program, except *Reports* and *Mail* functions. If you deny a user access to records through object level security, those records do not appear in queries, exports, global changes, batches, or in search results. However, if a user has access to a report or mailing type, the user has access to all information in the report or mailing, including records restricted through object level security. To totally restrict access to certain records, you must use system level security.

System Level Security. To create system level security, you give or deny rights based on certain characteristics within a record type. System level security gives users rights to view and edit constituent records based on constituent code; gift records based on fund; and notepads based on type. For example, if a user does not have access to gifts given to a fund based on system level security, the user cannot view or edit gifts associated with this fund in data entry, queries, imports, reports, and mailing functions. Even if the user has full access to reports and mailings, restricted information does not appear on them. System level security for constituent codes is based on inclusion and exclusion criteria.

Field Level Security. To create field level security, you grant or deny access to information entered in a specific field. Fields available for this security level are limited to credit card information and other selected biographical fields on the constituent record. If you deny access to these fields, they are disabled and appear with no values on records. For example, if you deny access to credit card information, the Credit Card grid is disabled on constituent records, and no credit card information appears on gift records. Users cannot use restricted fields as filter, sort, or output fields when they create queries. Users also cannot run existing queries that contain the restricted fields. With the exception of profiles, field level security does not affect information included in mailings and reports.

Inclusion and Exclusion. Inclusion and Exclusion security bases access to constituent records on whether the record contains one or multiple types of constituent code. Inclusion gives rights to a group for only those codes specified; exclusion denies rights for those codes specified. For example, with the constituent code of Alumni, if no exclusion criteria exists for a security group, the users in that group have access to all alumni, no matter what other constituent codes the record may have. If you then set an exclusion for Board Members, the users have access to all alumni except those whose records are also coded as Board Members. Using inclusion criteria, you can allow groups to access constituent records with only certain codes. If you specify the group has access to only constituents coded as Alumni, users can access only those records that contain that constituent code. If the record contains other codes in addition to alumni, the user still has access unless you establish exclusion criteria. If both inclusion and exclusion criteria are set up for the same group, the exclusion criteria takes precedence over the inclusion criteria. If you do not specify either inclusion or exclusion criteria, a user has access to all constituent codes.

Security Types Overview

Note: System level security checkboxes default to unmarked because by default, all users have access to all constituents, gifts, and notepads. Mark these checkboxes only to limit access to these records.

To assign security rights to a group, you mark a series of checkboxes. For some areas of the program such as *Records*, you can assign separate view, add, edit, and delete rights. For other areas such as *Query*, you can only grant or deny access to an entire module. All checkboxes default to marked (granting access) except the system security options: **Security by Constituency**, **Gift Security by Fund**, and **Notepad Security by Type**.

Records. You can assign view, add, edit, and delete rights for all record types. For example, you may want to give a group rights to view constituent records, but not to edit financial institution information, notes, or any other parts of the constituent record. You can assign field level security for several fields on the constituent record. Want to know more about "Records Security" on page 179?

Query. To define query security, you can mark or unmark a single checkbox that gives or denies all rights to *Query*. If you deny rights, users can still select queries in other areas of the program and run output and exception queries in reports. However, they cannot add new queries. System level security affects query results. Want to know more about "Query Security" on page 201?

Export. To define export security, you can mark or unmark a single checkbox that gives or denies all rights to *Export*. Want to know more about "Export Security" on page 202?

Reports. Rights to run reports are defined on two levels. You can assign rights by report type and more specifically by report name. For example, if you deny rights to analytical reports, a group cannot run any of them. However, you can grant rights to run analytical reports and deny rights to individual reports such as the Top Donors Report or LYBUNT Report. Records rights do not affect report rights. If a user has rights to a report, she has access to all records on that report. However, system level security by constituent code, notepad, or fund does affect the data that displays in reports. Want to know more about "Reports Security" on page 202?

Mail. You can define rights to run mailings by mailing types and more specifically by mailing functions. For example, if you deny rights to letters, the group cannot run any letters in the program. However, you can assign rights to run letters and still deny rights to individual letters such as Donor Acknowledgement letters and Follow Up letters. Records rights do not affect mailing options. If a user has rights to a mailing type, he has rights to all information included in that mailing. As with reports, system level security affects constituent and gift information in mailings. Want to know more about "Mail Security" on page 203?

Batch. You can assign rights to create, edit, delete, and commit batches. For example, you may want to grant a group rights to create and edit batches, but not to delete them. Security by Constituency and Gift Security by Fund affect which constituents and gifts are included in batches. In Batch security, you can also assign rights to access *Electronic Funds Transfer* for electronic funds transfers. Want to know more about "Batch Security" on page 203?

Mapping. To define security for the integration with Microsoft *MapPoint*, you can mark or unmark a single checkbox that gives or denies all rights to mapping. Want to know more about "Mapping Security" on page 205?

Administration. To assign rights for each administrative function, including data import, global add, and global delete, you can mark or unmark a checkbox that gives or denies rights. Because so many of these functions have wide ranging implications, we recommend you limit rights to only experienced users. Want to know more about "Administration Security" on page 205?

Configuration. To assign rights for each area of configuration, you can mark or unmark a checkbox that grants or denies rights. Rights to the **Fields** link of *Configuration* are automatically available only to users with Supervisor security rights. We recommend you limit rights to most functions to several key users. Want to know more about "Configuration Security" on page 206?

Code Tables. Fields with a down arrow to the right, such as **Constituent code** and **School name**, are code tables. When you click the down arrow, you can select from a list of entries. Tables add consistency to your data entry. You can assign rights to add, edit, and delete entries for each table in ***The Raiser's Edge***. To keep your table entries consistent and manageable, we recommend you limit rights to add or change code table entries to several key users. Want to know more about "Code Tables Security" on page 207?

Personal Information. You can specify whether social security numbers and bank account numbers are masked or visible to users. Want to know more about "Personal Information Security" on page 208?

Security by Constituency. You can use using inclusion and exclusion criteria to define the constituent records to which a group has access. For example, you can use inclusion to grant a group rights to only those records that contain the code Friend and you can use exclusion to deny a group rights to any constituent record containing the code Trustee. If you restrict rights to a particular code, the user cannot assign the code to any record. If both inclusion and exclusion rights are set up for the same group, exclusion rights always take precedence over inclusion rights.

Want to know more about "Security by Constituency" on page 213?

Gift Security by Fund. You can limit the ability of a group to access gifts given to particular funds. For example, if you deny access to gifts given to your Major Donor Annual fund, these gifts do not appear on reports, queries, or data entry records. Want to know more about "Gift Security by Fund" on page 216?

Notepad Security by Type. You can limit view and edit rights to selected notepad types. This can be useful if you keep sensitive information in a notepad. For example, you can grant view rights to a notepad type named "Director's Notes" to only the Director and Assistant Director. Want to know more about "Notepad Security by Type" on page 218?

Membership Scanning. To define security for *Membership Scanning*, you can mark or unmark a single checkbox that gives or denies rights to *Membership Scanning*. Want to know more about "Membership Scanning" on page 219 security?

Dashboard. To define *Dashboard* security, you can mark or unmark a single checkbox that gives or denies rights to *Dashboard*. Want to know more about "Dashboard" on page 219 security?

Install Samples. To define security for installing samples, you can mark or unmark a single checkbox that gives or denies rights to all samples. Sample queries, exports, custom reports, business rules, and more are available for installation when you select **Tools**, **Install Samples** from the shell menu bar. Want to know more about security to "Install Samples" on page 220?

NetSolutions. To assign rights for each area of *NetSolutions*, you can mark or unmark a checkbox that grants or denies rights to a specific area. Want to know more about security for "NetSolutions" on page 220?

Proposal Security by Purpose. You can limit the ability of a group to access proposal records based on the purpose for which the proposals are targeted. For example, you may have a purpose of "Major Gift" for which you want to limit access. If you deny access to proposals with a purpose of Major Gift, these proposals do not appear on reports, queries, or data entry records for a security group.

Want to know more about "Proposal Security by Purpose" on page 220?

Data Health Center. To define *Data Health Center* security, you can mark or unmark a single checkbox that gives or denies all rights to the *Data Health Center*. Want to know more about "Data Health Center" on page 221 security?

AMPro Integration. You can specify which parts of the *AuctionMaestro Pro* integration are available to a group.

Want to know more about "AMPro Integration" on page 222 security?

NetCommunity. When you integrate **The Raiser's Edge** with **Blackbaud NetCommunity**, you can specify which information from **Blackbaud NetCommunity** is available to a group.

Want to know more about "NetCommunity" on page 222 security?

Action Security by Type. You can limit view and edit rights to selected action types. This can be useful if you keep sensitive information in an action record. For example, you can grant view rights to a an action type named "Advocacy" to only the Advocacy Director and Assistant Director. Want to know more about "Action Security by Type" on page 223?

MatchFinder. You can specify which parts of the optional module *MatchFinder* are available to a group. Want to know more about "MatchFinder" on page 224 security?

Sphere. When you integrate **The Raiser's Edge** with Blackbaud **Sphere**, you can mark or unmark a single checkbox to give or deny all rights to the information downloaded from **Sphere**. Want to know more about "Sphere" on page 225 security?

Navigate in Security

You can access all security options from the **Security** link of *Administration*. From this link, you can create security groups and define the level of access they have in **The Raiser's Edge**. You can then add users to the groups based on the level of access they need to perform their job duties.

To access the Security page, on the Raiser's Edge bar, click **Admin**. The Administration page appears.

Administration

► System Statistics	► Duplicate Constituents
► Import	► Merge Constituents
► Globally Add Records	► Drop Lapsed Members
► Globally Change Records	► Security
► Globally Delete Records	► Queue
► Globally Write Off Pledges	► Target Analytics
► Convert Pledges To Recurring Gifts	► GiftWrap Integration
► Post to General Ledger	► Credit Card Exception Report

Administration

To help you maintain your database, and keep your records up-to-date, *The Raiser's Edge 7* includes a number of administrative tools. You can globally change, delete, and add records, count the records you have in your database, remove duplicate information from your database, merge information from two records, drop lapsed members, and validate database indexes.

Note: To return to the main Administration page, click the word "Administration" in the page title bar below the shell menu bar.

On the main Administration page, click **Security**. The Security page appears.

Administration • Security

Security

Here you can define groups and users with rights to view, add, edit, and delete information. For more information, see Security.
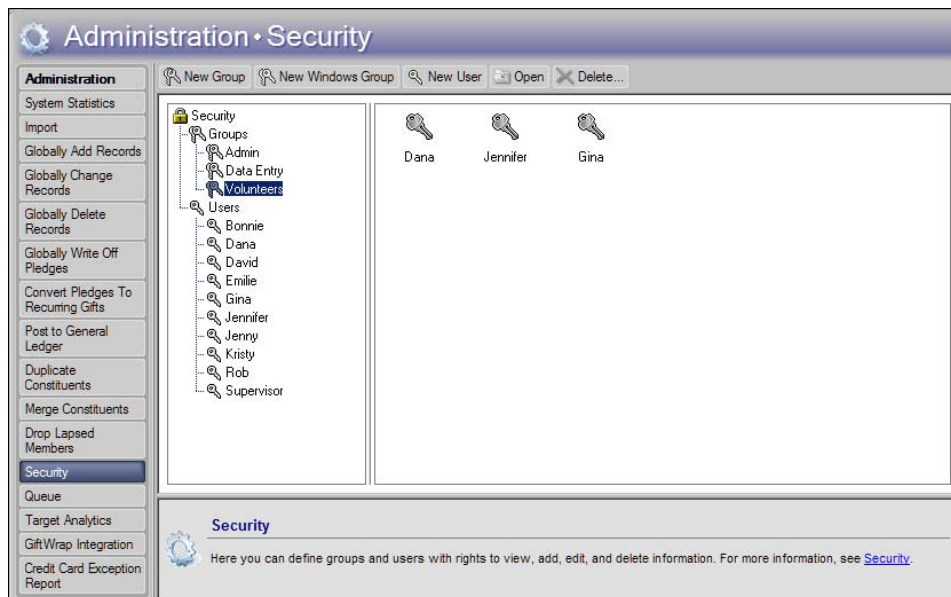
The tree view on the left lists all established **Security Groups** and all **Users** identified in **Security**. When you select a group from the tree view, all members of that group list in the box on the right. When you select a user in the tree view, all groups to which the user belongs list on the right.

"More About Security" on page 158

"Security Types" on page 178

"Security Groups" on page 165

"Security Users" on page 170

Toolbars

Security user and group records contain several toolbar buttons to help you carry out commands quickly and easily without using the menu bar. You can mark **Show Tooltips** on the General Tab of User Options so when you move the cursor over a button, a description of its function displays. Toolbar buttons with a down arrow contain additional options.
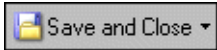
Save and close the current record (**Save and New** can be accessed from the down arrow beside **Save and Close**. Use **Save and New** to save the record, close the saved record, and open a new record.)

Save the record and keep the record open

Delete

Go to the previous record

Go to the next record

View the properties of the current record

Access help contents

Manage Security

Your first step to establish security for **The Raiser's Edge** is to create security groups. Give the groups descriptive names you can easily identify. Assign privileges to a group based on the areas of the program to which you want its members to have access. For example, a group that contains experienced users may have access to *Administration* functions such as **Import** and **Globally Delete Records**. To avoid accidents in your database, we recommend you deny any group with less experienced users access to these functions. Create as many different groups as you need. Then, as you add users to **Security**, make them members of whichever groups grant them the level of access needed to perform their job duties. When you add users, you must also decide whether they can change User Options and their own passwords.

You can assign Supervisor rights to users. Only users with Supervisor rights have full access to all areas of **The Raiser's Edge**. You can also change the Supervisor password. We recommend you do so frequently. At least two people in your organization should have Supervisor rights and know the Supervisor password.

"Security Groups" on page 165

"Security Users" on page 170

"Supervisor Security Procedures" on page 176

Security Groups

You can add new security groups and edit the rights and members of groups you already established.

To control security in *The Raiser's Edge*, you create groups with different rights and assign your users to these groups based on how much access to records and functions you want them to have. In addition to the creation of new groups, you can edit the rights for existing ones.

Although each user has a unique password, you can use groups to define the functions that users assigned to a group can perform and the records they can view, add, edit, and delete. For example, to create a group for workers who add new constituent records but do not edit existing constituent records, you can give add rights and denying edit rights to constituent records.

If you use *Active Directory*, you can also base your security groups on that structure. For more information, see "Windows Authentication Security Groups" on page 167.

▶ **Add a security group**

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

2. Click **Security**. The Security page appears.

> **Note**: You can also access the New Group screen by double-clicking **Groups** in the treeview.

3. On the action bar, click **New Group**. The New Group screen appears.
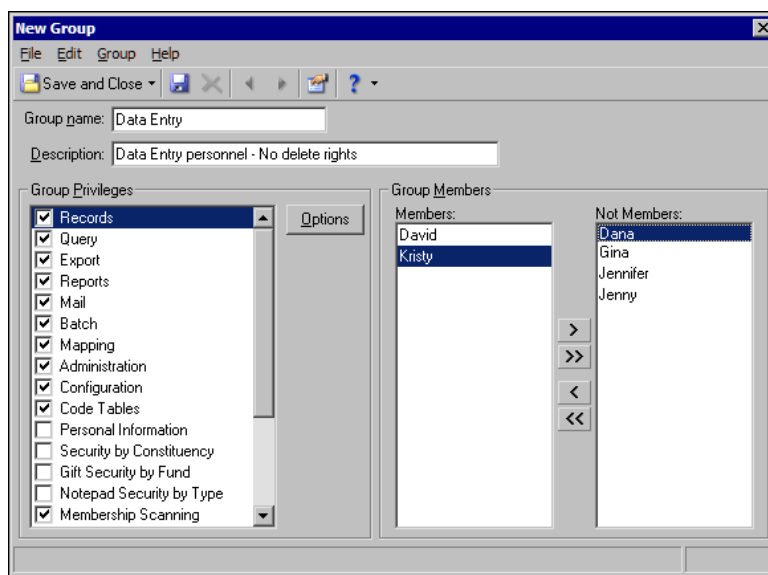
> **Note**: We recommend you use descriptive names for your groups. For example, you can create a group called "Data Entry" with a description of "Data Entry personnel - No delete rights", that contains security settings customized for all members of your organization who enter information into the program.

4. In the **Group Name** and **Description** fields, enter a unique name and description to identify the new group. The group name appears in the tree view on the main Security page.

5. Under **Group Members**, use the arrows to move individuals or the entire group between the **Members** and **Not Members** boxes. Use the single arrow to move one selected name or the double arrow to move all names from one box to the other. For new groups, all users that you define (including the Supervisor) are initially in the **Not Members** box.

6. The **Group Privileges** frame contains a list of the different security types as checkboxes. Initially, the program grants the group access to all areas except those available to only users with Supervisor rights. All security type checkboxes default to marked except the system security options: **Personal Information**, **Security by Constituency**, **Gift Security by Fund**, and **Notepad Security by Type**. The system security checkboxes default to unchecked because by default, the group has access to all constituents, gifts, and notepads; mark these checkboxes only to limit access to these records.

Note: If you add the Supervisor as a member of a security group, Supervisor rights are not affected. For more information about Supervisor rights, see the Supervisor Procedures section of this chapter.

For a detailed explanation of how to assign group privileges for each type of security in *The Raiser's Edge*, see "Security Types" on page 178.

7. To save the record, click **Save and Close** on the toolbar. You return to the Security page.

"Edit basic group information" on page 166

"Delete a group" on page 167

▶ **Edit basic group information**

You can change the members and rights of a security group. For example, if a worker gets promoted, you may want to remove the employee from one group and add him to another. Or, you may want to change the rights granted to a particular group. This procedure demonstrates how to make all users members of a group called "Data Entry."

Scenario: You decide to give all your users data entry rights. To do this, you will make them all members of your Data Entry security group.

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

2. Click **Security**. The Security page appears.

3. From the tree view, select the Data Entry group. The members already assigned to the group appear.

4. On the action bar, click **Open**. The Data Entry screen appears.
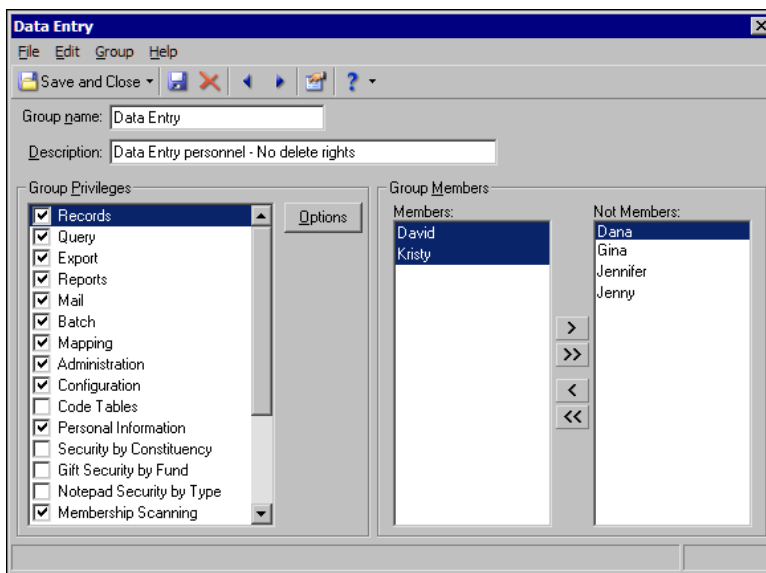
5. Under **Group Members**, all users added to **Security** appear in either the **Members** or **Not Members** box. To include all users in the security group, select any name in the **Not Members** box and click the double left arrow. All names in the **Not Members** box move to the **Members** box. All your users now have the rights you assigned to the Data Entry group. For information on the types of security rights you can assign to a group, see "Security Types" on page 178.

6. To save your changes, click **Save and Close** on the toolbar. You return to the Security page.

"Delete a group" on page 167

▶ **Delete a group**

Warning: Before you delete a security group, we recommend you print a security profile of the group to back up your data. To print a profile, select **File**, **Print** from the menu bar while the group record is open.

You can remove a group from **Security**. Before you do so, we recommend you print a security profile to back up your records. Deleting a group does not remove the users who are members of that group from **Security**. This procedure demonstrates how to delete a group called "Volunteers."

> *Scenario:* You have a security group for volunteers who have limited rights to enter and view data for only constituents. You decide to eliminate this group and assign all its members to your Data Entry group. By doing so, your volunteers can also enter other information such as action records.

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

2. Click **Security**. The Security page appears.

3. In the tree view, select **Volunteers**.

4. On the action bar, click **Delete**. A verification message appears.

5. To delete the group, click **Yes**. The Security page appears.

6. From the Security page tree view, click **Users**. The members of the group appear. You can now assign them to the Data Entry group.

Windows Authentication Security Groups

If you have well organized and well established *Active Directory* user/group schemes, you can leverage that infrastructure when you create groups in **The Raiser's Edge**. You can manage your users from a single location without the need to duplicate your network directory in **The Raiser's Edge**.

Warning: The program does not allow duplicate *Windows* user names in different groups, so you cannot set users added through *Windows* security groups to also use *Windows* authentication as part of another group. If names in a *Windows* group match existing users in **The Raiser's Edge**, you cannot add the *Windows* group. So, it is important to remove any users specified to use *Windows* authentication from other groups before you include them in a new *Active Directory* or LDAP group.

To assign multiple users to a group, you can either add an *Active Directory* group or use a Lightweight Directory Access Protocol (LDAP) query. LDAP is an Internet protocol that programs use to look up information from a server.

▶ **Assign a Windows group to a security group**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Windows Group**. The New Group screen appears.
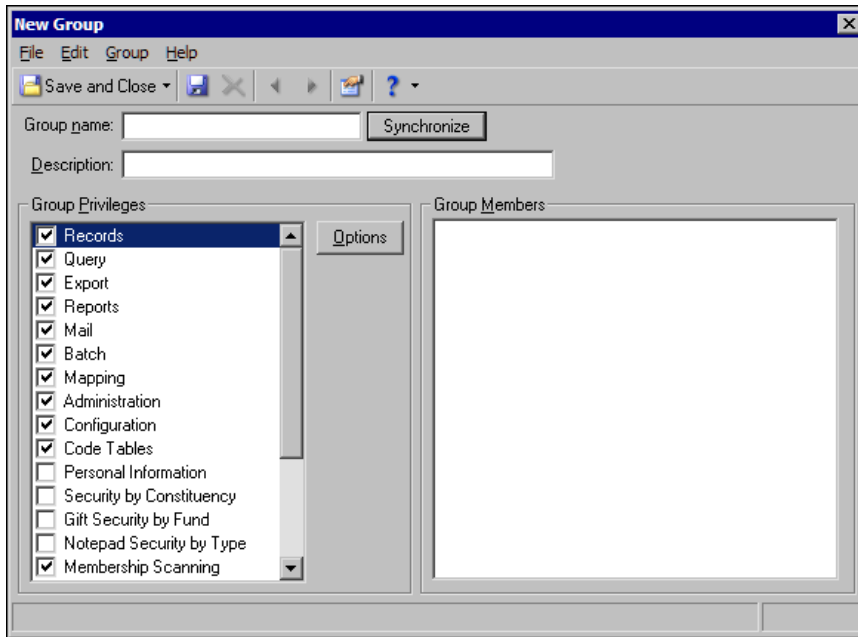
4. Click **Synchronize**. The Group Browser screen appears.
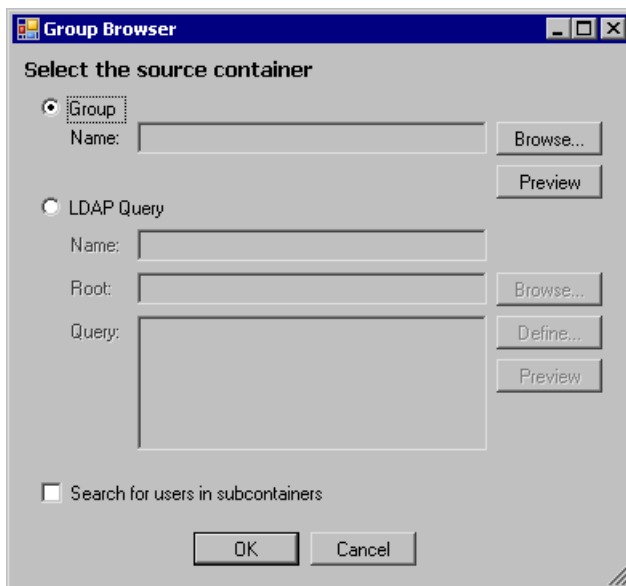
5. Select whether to add users through an *Active Directory* group or LDAP query.

   • To add an *Active Directory* group, select **Group** and click **Browse**. The Windows Select Group screen appears. For more information about the items on this screen, click the question mark on the screen title bar and drag it over an item.

   • To add users with an LDAP query, select **LDAP Query**. In the **Name** field, enter a descriptive name to identify the query.

      To specify where the program should begin to search, click **Browse** and select the desired location within your organization's *Active Directory* structure. When you select a location, it appears in the **Root** field. When you set this "starting point", you can greatly improve the performance of your LDAP query.

To manually enter a valid LDAP query, enter the syntax in the **Query** field. If you are not familiar with LDAP syntax, click **Define** to use the LDAP Query Wizard to build a simple query.

6. To view a list of the users included in the group or query specified, click **Preview**.

7. To include users in any groups within the group or query specified, mark **Search for users in subcontainers**. If you unmark the checkbox, the program returns only those users found explicitly within the specified group or query.

8. Click **OK**. You return to the New Group screen.
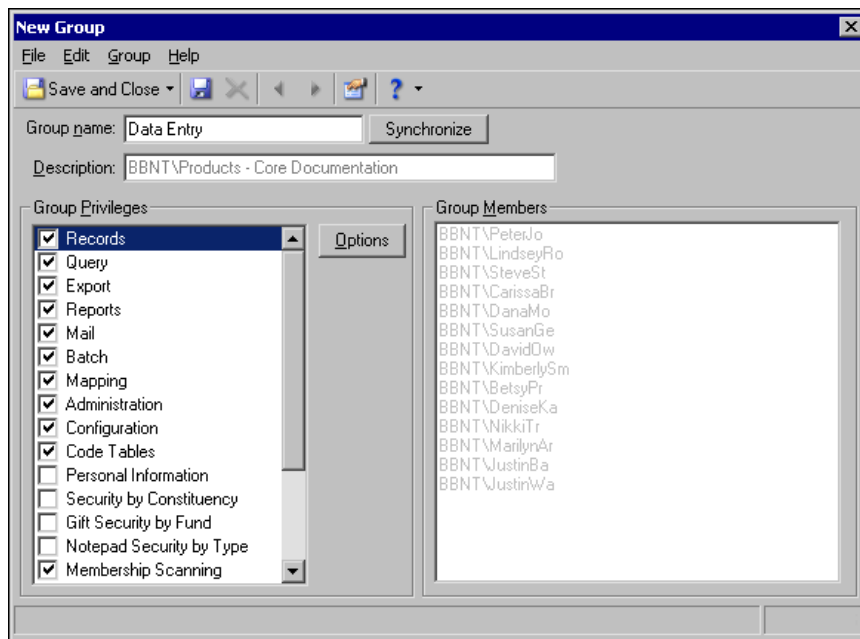
Under **Group Members**, the users in your *Active Directory* group or LDAP query appear. You cannot add or remove members from the box; membership in this security group is based solely on membership in the selected *Active Directory* group or LDAP query.

Initially, the program grants the group access to all areas, except those available to only users with Supervisor rights. All security type checkboxes default to marked except the system security options: **Personal Information**, **Security by Constituency**, **Gift Security by Fund**, and **Notepad Security by Type**. The system security checkboxes default to unmarked because by default, the group has access to all constituents, gifts, and notepads. Mark these checkboxes only to limit access to these records.

For a detailed information about how to assign group privileges for each type of security in ***The Raiser's Edge***, see "Security Types" on page 178.

9. To save the group, click **Save and Close**. You return to the Security page.

For information about how to synchronize your *Windows* users and your security groups in ***The Raiser's Edge***, see "Synchronize Users in Windows and The Raiser's Edge" on page 169.

Synchronize Users in Windows and The Raiser's Edge

After you create and save a group, when you click **Synchronize** on the Groups tab, the program creates a complete list of users in all specified groups and LDAP query results. The program then updates the group. To update the group, the program adds the users who are not currently assigned to the role, and removes users who were previously synchronized but are not currently in the query results.

To automate this process, use the Blackbaud.GroupSync.exe utility (located in "The Raiser's Edge 7" folder of your installation), accessed from all common administrative tools (batch files, wscript, at command, etc.). To schedule regular synchronizations through the GroupSync utility, you can use the *Windows Scheduled Task Wizard*.

Security Users

> **Note**: If a user belongs to multiple groups, the rights in the groups are combined. However, this does not apply to system level security (Gift Security by Fund, Notepad Security by Type, and Constituent Security by Constituency). If a user belongs to one group that has system level rights to records and another that does not, the user does not have rights to those records. We recommend you do not assign users to multiple security groups.

To add users to **Security** and define their level of access in *The Raiser's Edge*, you can assign them to security groups. Although you can add users to multiple groups, we recommend you do not. If a user belongs to multiple groups and one group has system level security rights to an area of the program that the other does not, the user does not have rights to that area. For example, if a user belongs to two groups, and one group has access to a certain notepad type or fund, but the other group does not have access to that notepad or fund, the user does not have access to the record. You can delete users from **Security** without removing them from your database.

• "Add a user to Security" on page 170

• "Delete a user" on page 172

"Security Groups" on page 165

"Passwords" on page 172

"User Options Security" on page 174

▶ **Add a user to Security**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New User**. The New User screen appears.

4. In the **User name** field, enter the user name the user enters, along with a password, to log into *The Raiser's Edge*. This user name also appears in the Security tree view.

   The program reserves certain words, such as "index," and you cannot use them as user names. If you enter a reserved word or duplicate name in the **User name** field, a message appears to inform you the user name must be unique. To return to the New User screen and enter a new user name, click **OK**.

5. In the **Description** field, enter a description to further identify the new user, such as the user's job title or full name.

6. To link the user to a constituent record, click the binoculars in the **Constituent name** field. The Open screen appears so you can select the constituent record. We recommend you create this link, such as to display action reminders for solicitors who are also users in *The Raiser's Edge*.

7. If you have Microsoft *Outlook*, the **Outlook user** field appears. To link the user to a contact in *Outlook*, enter a name from your *Outlook* address book in this field, exactly as it appears in *Outlook*. When you link users to *Outlook*, they can receive meeting requests in their *Outlook* calendars when an action is entered in *The Raiser's Edge*. Users can receive reminders through *Outlook*, instead of, or in addition to the reminder from *The Raiser's Edge*.

8. If you use an *Oracle* database, the **Database user** and **Database user password** fields appear. To link the user to a user in the *Oracle* database with the BLACKBAUD_USER role, in the **Database user** field, select the *Oracle* database user to link to the user in *The Raiser's Edge*.

   In the **Database user password** field, enter the database access password for that user. If you do not map to a specific database user, "REUSER" (which is a valid login) is the default user and password.

9. Under **Group Assignments**, select whether the user has full or limited access.

   • To assign the user full access to the program, mark **Supervisor rights**

   • To limit access for the user, mark **Selected group rights**. The **Member of** and **Not a member of** boxes are enabled. To include the user in a group, select the group in the **Not a member of** box and click the right arrow to move it to the **Member of** box.

10. Under **Connection Options**, select whether the user logs in with *The Raiser's Edge* or *Windows* authentication.

    • To allow the user to access *The Raiser's Edge* with a password unique to the program, mark **RE7 Authentication**. In the **Password** and **Confirm** fields, enter the password for the user. Your entry in both fields must be identical.

    • To base the user's login information for *The Raiser's Edge* on his *Windows* login information, mark **Windows Authentication**. When users log into a workstation through *Windows* authentication and then access *The Raiser's Edge*, *The Raiser's Edge* uses the *Windows* information to automatically log the user in so the user does not need to remember a separate password. If a security user's *Windows* authentication information changes, *The Raiser's Edge* automatically recognizes the change.

      To associate a user's *Windows* authentication information with *The Raiser's Edge*, click the binoculars in the **Login** field. The Select User Account screen appears so you can select the system to which the user belongs. To add a user, select the user in the **Names** box and click **Add**. To return to the New User screen, click **OK**.

    • To store a password for a user even though *The Raiser's Edge* typically authenticates the user through *Windows*, mark both **RE7 Authentication** and **Windows authentication**.This can be useful if, for example, the user runs the standalone version of *The Raiser's Edge* but the network goes down. Even if *Windows* authentication fails, the user can still log in to *The Raiser's Edge*.

      When you mark both checkboxes, you affect only whether *The Raiser's Edge* stores a password for the user. *The Raiser's Edge* always tries *Windows* authentication first, but if that fails for some reason, *The Raiser's Edge* login screen appears.

11. To allow the user to change various displays, screen appearances, and defaults throughout the program, mark **User can change User Options**. These options affect only that user. For more information, see the "User Options" chapter of the *Program Basics Guide*.

12. To specify user options other than the defaults for the user, click **Set This User's Options**. The Options screen appears so you can establish User Options that affect only this user. You can also copy user option settings from another user. For more information, see "Copy user option settings from one user to another" on page 175. For information about the tabs on the Options screen, see the "User Options" chapter of the *Program Basics Guide*.

13. To save the new user, click **Save and Close** on the toolbar. You return to the Security page.

▶ **Delete a user**

Warning: Before you delete a user from **Security**, we recommend you print a security profile of the user to back up your data. To print a profile, select **File**, **Print** from the menu bar while the user record is open.

When you delete a user from **Security**, if he has a constituent record in your database, it is not removed from the database. Before you delete the security record, we recommend you print a security profile for the user to back up your data.

> ***Scenario:*** Robert Thompson, a member of your Data Entry group, leaves your organization to return to school. You entered him in your constituent database as a volunteer. You want to remove him from the Data Entry group but keep his record in your database because he may work with you again next summer. If he returns, you will reassign him security rights based on his job responsibilities at that time. The Security treeview lists by **User name**. Robert Thompson's user name is Robert.

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

Note: A user cannot delete his own security record.

2. Click **Security**. The Security page appears.

3. From the Security tree view, select **Robert**the user to remove and click **Delete** in the action bar. A verification message appears.

4. Click **Yes**. You return to the Security page. Robert ThompsonThe user no longer appears in the tree view, and the constituent record remains unchanged.

Passwords

The Raiser's Edge requires the use of strong and complex passwords. Passwords are case-sensitive and require numeric and alphabetic characters. Passwords can have up to 50 characters but must have a minimum of eight characters.

Note: For additional security, you can require users to change their passwords on a regular basis. For information about how to enable password expiration, see "System Access Options" on page 130.

New passwords cannot match one of the last four passwords used by the user. The Supervisor can change passwords for users who do not have rights to change their own passwords. For example, the Supervisor may need to change a password for a user who forgets his current password.

You can select to use a user's *Windows* authentication information to log into the program instead of a ***The Raiser's Edge*** user name and password. For more information, see "Add a user to Security" on page 170.

• "Change a user's password" on page 172

• "Give a user rights to change her own password" on page 173

▶ **Change a user's password**

The Supervisor can change the password of any user. Other users, even those with Supervisor rights, cannot change other user's passwords.

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

2. Click **Security**. The Security page appears.

3. In the tree view, select the user with the password to change.

4. On the action bar, click **Open**. The user's security screen appears.

Note: The actual password does not appear in the **Password** and **Confirm** fields. For privacy, only asterisks appear in the fields.

5. Under **Connection Options**, the user's current password appears as asterisks in the **Password** field. In the **Password** and **Confirm** fields, enter the new password for the user.

6. To save your changes, click **Save and Close** on the toolbar. You return to the Security page.

If your entries in the **Password** and **Confirm** fields are not identical, when you try to save the record, a message appears to inform you that the passwords entered do not match. Click **OK** and enter the new password in the **Password** and **Confirm** fields again.

▶ **Give a user rights to change her own password**

Note: In *Configuration*, you can set a business rule to allow passwords to expire after a specific number of days. If you enable password expiration, all users automatically receive rights to change their passwords. For information about how to enable password expiration, see "System Access Options" on page 130.

You can allow a user to change his own password. Users with rights can select **Edit**, **Password** on the menu bar change their passwords from anywhere in *The Raiser's Edge*.

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

2. Click **Security**. The Security page appears.

3. In the tree view, select the user to grant password change rights.

4. On the action bar, click **Open**. The user's security screen appears.
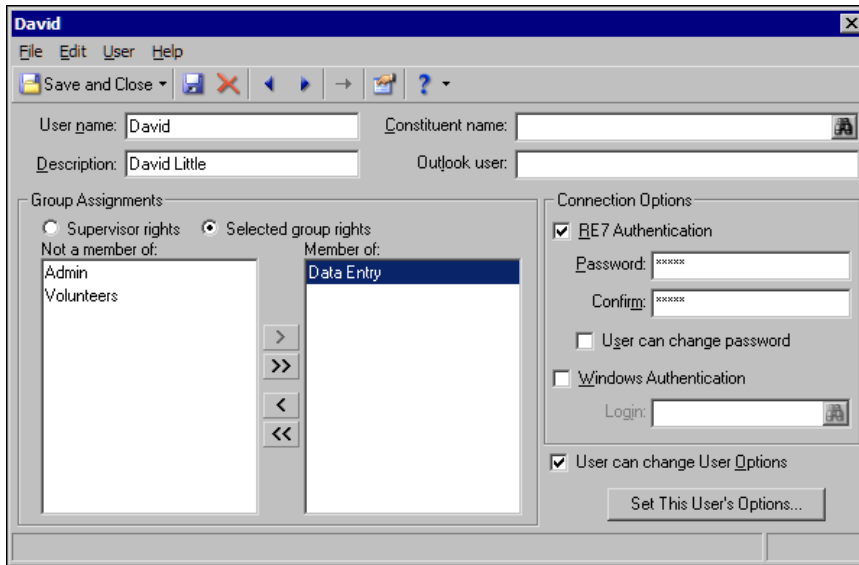
5. Under **Connection Options**, mark **User can change password**.

6. To save your settings, click **Save and Close** on the toolbar. You return to the Security page.

User Options Security

The Supervisor can determine whether users can change user options. User options affect various display and data entry preferences throughout the program. You can copy user options established for one user to another user

▶ **Give a user rights to change user options**

You can give a user rights to change various display and data entry preferences throughout the program. These options affect only that user. For more information, see the "User Options" chapter of the *Program Basics Guide*.

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

2. Click **Security**. The Security page appears.

3. In the tree view, select the user to grant user options change rights.

4. On the action bar, click **Open**. The user's security screen appears.

5. Mark **User can change User Options**.

6. To save your settings, click **Save and Close** on the toolbar. You return to the Security page.

▶ **Copy user option settings from one user to another**

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

2. Click **Security**. The Security page appears.

3. In the tree view, select the user to grant user options change rights.

4. On the action bar, click **Open**. The user's security screen appears.

5. Click **Set This User's Options**. The Options screen appears.
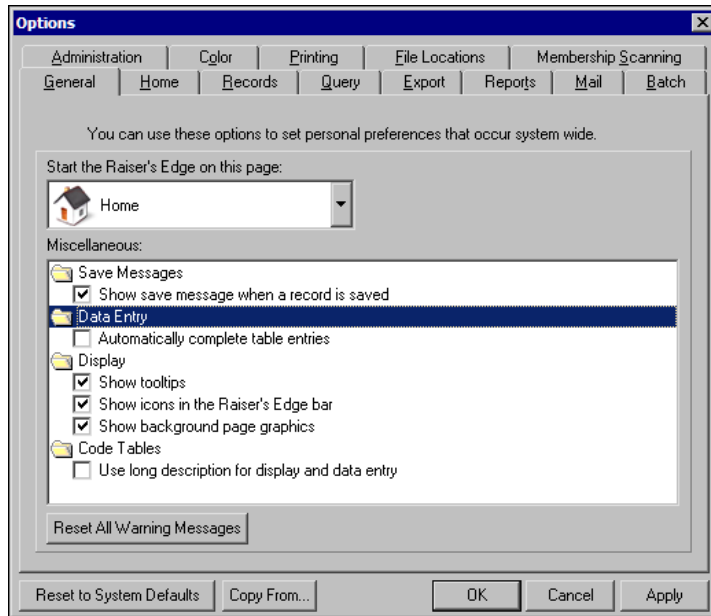
6. Click **Copy From**. The Copy User Options from Existing User screen appears.
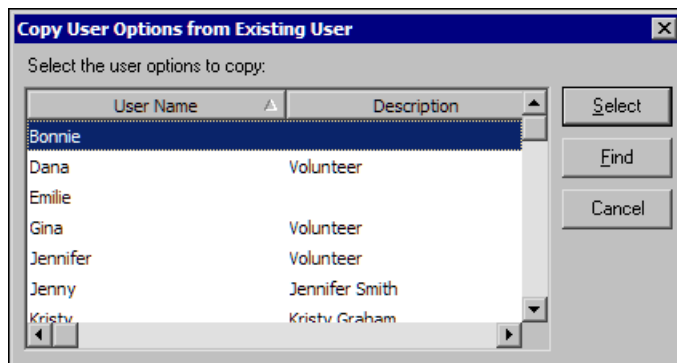
7. Select the user with the user options to copy and click **Select**. You return to the Options screen. All user options settings of the selected user appear.

8. To save the user options, click **OK**. You return to the Security User screen.

9. Click **Save and Close**. You return to the Security page.

Supervisor Security Procedures

The program is shipped with the Supervisor password of "ADMIN". This password is case sensitive. We strongly recommend you change the Supervisor password as soon as possible. You can assign Supervisor rights to any other users. We recommend that at least two members of your organization have full Supervisor rights and know the Supervisor password.

- "Change the Supervisor password" on page 177
- "Assign Supervisor rights" on page 177

▶ **Change the Supervisor password**

Note: Any user with security rights to security itself can view the Supervisor record, but the **File**, **Delete**, and all **Edit** menu options are disabled.

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

2. Click **Security**. The Security page appears.

3. In the tree view, select **Supervisor**.

4. On the action bar, click **Open**. The Supervisor screen appears.

Note: The actual password does not appear in the **Password** and **Confirm** fields. For privacy, only asterisks appear.

5. Under **Connection Options**, enter the new Supervisor password in the **Password** and **Confirm** fields. Your entry in both fields must be identical. If you log in as Supervisor, to change the password from anywhere in the program, select **Edit**, **Password** from the menu bar.

6. To save the new password, click **Save and Close** on the toolbar. You return to the Security page.

▶ **Assign Supervisor rights**

Note: Only users with Supervisor rights have access to all areas of *The Raiser's Edge*.

You can assign Supervisor rights to any of your users. Only users with Supervisor rights have full access to all areas of *The Raiser's Edge*.

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

2. Click **Security**. The Security page appears.

3. In the tree view, select the user to grant supervisor rights.

4. On the action bar, click **Open**. The user's security screen appears.
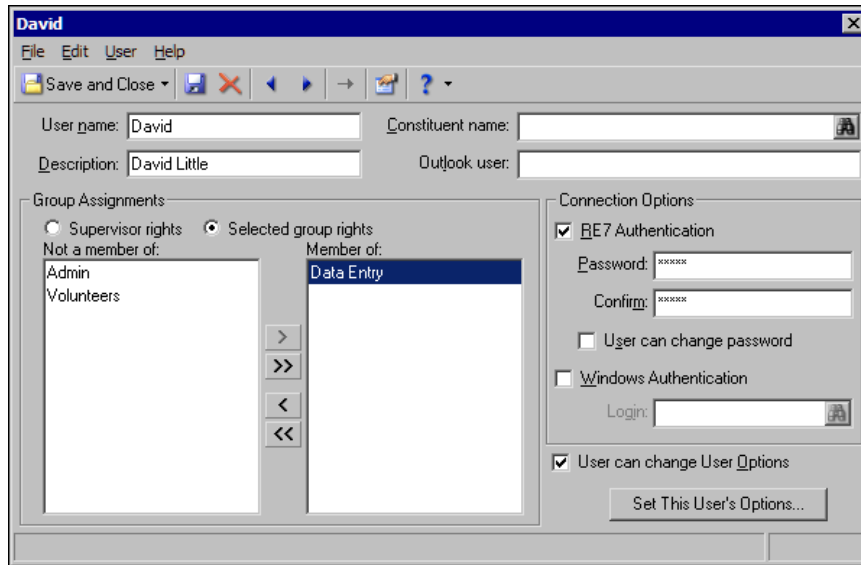
5. Under **Group Assignments**, select **Supervisor rights**.
6. On the toolbar, click **Save and Close**. You return to the Security page.

Security Types

Once you enter the basic information for a new security group, you can define the security privileges for the group by type. Some security types, such as records, have separate checkboxes to allow users to view, add, edit, or delete a record. Other types, such as Administration, contain checkboxes to allow access to each function contained in that area of the program. Finally, some types, such as Query, consist of a single checkbox which you mark or unmark to grant or deny access to that particular area or function of *The Raiser's Edge*. Use these options to specify the level of access for each of your groups.

The security types are:

- "Records Security" on page 179
- "Reports Security" on page 202
- "Mail Security" on page 203
- "Query Security" on page 201
- "Export Security" on page 202
- "Batch Security" on page 203
- "Mapping Security" on page 205
- "Configuration Security" on page 206
- "Code Tables Security" on page 207
- "Personal Information Security" on page 208
- "Security by Constituency" on page 213
- "Gift Security by Fund" on page 216
- "Notepad Security by Type" on page 218
- "Membership Scanning" on page 219
- "Dashboard" on page 219

- "Install Samples" on page 220
- "NetSolutions" on page 220
- "Proposal Security by Purpose" on page 220
- "Data Health Center" on page 221
- "AMPro Integration" on page 222
- "Action Security by Type" on page 223

Records Security

Warning: Even if you limit rights to records here, users can still globally delete records in *Administration* unless you deny security rights to that function. We strongly recommend you grant *Administration* rights only to key, experienced users. For more information, see "Administration Security" on page 205.

All record types default to marked to grant full access to the security group. If you unmark a checkbox, you deny all access to that record type, such as the right to view the record. When you mark the checkbox for a particular record type, you can make security access even more specific by allowing a user rights to a record type while at the same time restricting rights to tabs within that record type. For example, you can specify that a group have rights to view, add, edit, and delete constituent records in general, but only rights to view the Attributes tab of the constituent record specifically. You can assign security for several specific fields on the constituent record.

The rights you assign here affect the users' ability to access this data from the Records page and from anywhere in the program that a record can be opened. These rights affect the ability to access data from queries, global changes, and exports. Rights you assign here affect group add functionality and the ability to import information. If a user is restricted from certain records, he cannot update or import those record types. The rights you assign here do not affect the ability to print record information on reports, mail forms, or labels. To completely block record information from a user, you must set system level restrictions. For more information about system level security, see "Security by Constituency" on page 213, "Gift Security by Fund" on page 216, or "Notepad Security by Type" on page 218. To completely block access to records in an *Administration* function such as global delete, you should restrict access to that function. For more information, see "Administration Security" on page 205.

You can assign security for the following record types:
- "Constituents Security" on page 181
- "Gifts Security" on page 187
- "Actions (Constituent) Security" on page 188
- "Jobs Security" on page 189
- "Memberships Security" on page 190
- "Campaigns Security" on page 191
- "Funds Security" on page 192
- "Appeals Security" on page 194
- "Events Security" on page 195
- "Actions (Events) Security" on page 196
- "Jobs (Events) Security" on page 197
- "Participants (Events) Security" on page 198
- "Actions (Appeals) Security" on page 199
- "Planned Gifts Security" on page 200

Want to see a general procedure for "Assign records security privileges" on page 180?

▶ **Assign records security privileges**

Many record types contain specific and unique security options. This procedure examines security for records in general. Then, each record type is discussed in detail under a separate heading.

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

> **Note**: If you unmark the **Records** checkbox, you deny all rights to all records for the group.

5. Click **Options**. The Security Options screen appears.

> **Note**: Locked rows or columns in the grid appear in color and are not editable. You can select the color in which locked cells display on the Color tab of User Options.

6. The **Record Types** box lists each record type as a checkbox. Each defaults to marked. You cannot unmark **Campaigns**, **Funds**, or **Appeals**. Because they are associated with so many other records, view rights for campaign, fund, and appeal records are automatically given to users when you mark **Records** on the New Group screen.

   The features you have in *The Raiser's Edge* determine the number of record types that appear. For example, if you have *Membership Management*, **Memberships** appears as a record type.

   Select a record type to view its corresponding options in the Privileges grid on the right. The actual name of the grid depends on your selection in the **Record Types** box. When you unmark a checkbox for a record type, the Privileges grid is disabled and view rights to that record type are denied for the group.

> **Note**: If a user has only view rights to a record type, all fields for that record type are disabled so the user cannot enter or edit information.

   For some record types, a **Miscellaneous Options** box appears below the Privileges grid where you can assign rights for additional functions.

7. Determine whether the group has rights to view, add, edit, and delete record information.

Even if you limit rights to records here, users can still globally change and globally delete records if they have rights to those *Administration* functions. We recommend you limit rights to Administration functions to only key experienced users. For more information about how to assign security rights in *Administration*, see "Administration Security" on page 205.

- **View** - To allow a group to view a record type, but still restrict rights for the group to view tabs within the record type, mark **View**. Any tabs for which a user does not have view rights are hidden.

Warning: The rights you assign here do not affect the users' ability to print the information in reports, mailings, or labels.

If you unmark the checkbox, a group does not have rights to view a record type.

- **Add** - To allow a group to add information to a record, mark **Add**.
- **Edit** - To allow a group to change the information in a record, mark **Edit**.
- **Delete** - To allow a group to remove a record from the database, mark **Delete**.

If a function is unavailable for a record, N/A appears instead of a checkbox. For example, you add and delete attributes in *Configuration*, so N/A appears in the **Attributes** row in record security.

8. To save your settings, click **OK**. You return to the New Group screen.

Constituents Security

Some tabs of the constituent record do not allow all four view, add, edit, and delete options. For example, on the Attributes tab you can assign only view and edit rights because you set add and delete rights for Attributes in the *Configuration* section of **Security**.

For other tabs, mark or unmark **View** to give or deny all rights to the entire tab.

All options default to marked, granting full access to the group.

▸ **Assign security rights to constituent records**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.
2. Click **Security**. The Security page appears.
3. On the action bar, click **New Group**. The New Group screen appears.
4. Under **Group Privileges**, select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. In the **Record Types** box, select **Constituents**. The **Constituents Privileges** grid and **Miscellaneous Constituent Options** box appear.

Note: If a user does not have access to **View** rights for a particular tab, the tab does not appear, and the user cannot perform any actions on it. To select which tabs appear when a group opens a record, use the **View** column.

When you mark **Constituents**, you give access rights for the record type itself. Because a user who has rights to a record type automatically has view rights to that type, the **View** column is locked as marked on the **CONSTITUENT** row of the **Constituents Privileges** grid. All other rows represent tabs or other information within the record type. You can both allow a user to view a record type and restrict view rights to tabs or information within that type. If this is the case, the restricted tab or information does not appear on the record.

7. In the **Constituents Privileges** grid, assign rights for constituent records:

Note: The Gifts tab is not included as an option here because gifts security access is defined as a separate record type.

- **Biographical** - In this row, only the **Edit** checkbox is available. For a detailed explanation of what happens when you unmark this checkbox, see "Biographical Security Details" on page 184.

- **Alias** - In this row, select whether users can view or edit aliases. An alias is a secondary identification or acronym used to identify a constituent. For example, an alias for Business Information Systems may be BIS. Users can use aliases to search for and access a record. Users can access aliases from the **Aliases** button on the Bio 1 or Org 1 tab of constituent records.

- **Address** - In this row, select how much access users have to constituent addresses. For a detailed explanation of what happens when you unmark the checkboxes in this row, see "Address Security Details" on page 186.

- **Phone** - In this row, only the **View** and **Edit** checkboxes are available. Select the user rights to the constituent phone numbers in the **Phones/Email/Links** grid on the Bio 1 or Org 1 tab of constituent records.

Note: Even if a user does not have **Edit** rights for addressee/salutations, the user can still view the Label Truncation Report in *Mail*.

- **Addressee/Salutation** - In this row, only the **Edit** checkbox is available. For a detailed explanation of what happens when you unmark this checkbox, see "Addressee/Salutation Security Details" on page 187.
- **Solicitor Details** - In this row, select how much access users have to the information gained through the solicitor **Details** button on the Bio 1 or Org 1 tab.
- **Relationships - Individuals** - In this row, select how much access users have to individual constituent relationships. If you mark **Add**, the user can access all information except for that on the Business and Education screens (based on rights to Relationships - Organizations and Education/Schools), and that which may be limited due to Biographical, Address, or Addressee/Salutation security settings.
- **Relationships - Organizations** - In this row, select how much access users have to information gained through the **Business** button on the Bio 1 tab.
- **Relationships - Funds** - In this row, select how much access users have to information about the fund relationships of the constituent.

Note: Any function for which a user does not have rights is disabled during the login process. If you change user rights while the user is logged in, the changes do not take effect until the user closes and opens that area of the program again.

- **Banks/Financial Institutions** - In this row, select how much access users have to the information through the **Bank** button on the Bio 1 tab.
- **Education/Schools** - In this row, select how much access users have to the information gained through the **Education** button on the Bio 1 tab.
- **Assigned Solicitors** - In this row, select how much access users have to the solicitor hierarchy for the constituent.
- **Appeals** - In this row, only the **View** and **Edit** checkboxes are available. Select the user rights to the Appeals tab on the constituent record.
- **Notes** - In this row, select how much access users have to notes your organization adds about constituents. You can use Notepad Security by Type to restrict access to specific notepads, such as those that contain sensitive subject matter. For more information, see "Notepad Security by Type" on page 218.
- **Attributes** - In this row, only the **View** and **Edit** checkboxes are available. Select the user rights to the Attributes tab of the constituent record.
- **Media** - In this row, select the access users have to photos and clippings attached to the constituent record as media objects.

Note: Attributes are added and deleted in *Configuration*.

- **Honor/Memorial** - In this row, only the **View** checkbox is available. Select whether users can access the Honor/Memorial tab of the constituent record. Access to the **View Gifts** button is based on access to gifts.
- **Volunteer** - In this row, only the **View** checkbox is available. Select whether users can access the Volunteer tab of the constituent record. If you mark **View**, the **Qualifications**, **Availability/Interests**, **Job Assignments**, **Time Sheets**, and **Awards** rows are enabled so you can define volunteer security in more detail.
- **Prospect** - In this row, only the **View** checkbox is available. Select whether users can access the Prospect tab of the constituent record. If you mark **View**, the **Financial**, **Proposals**, and **Ratings** rows are enabled so you can define prospect security in more detail.
- **Ratings** - In this row, select how much access users have to information on the Ratings tab of the constituent record. The **Ratings** row only appears if you do no have the optional module *RE:Search*.

Note: When a constituent record is open, users with rights to Annotations can select **Edit**, **Annotate** from the menu bar or click **Annotate** on the toolbar to access annotations.

- **Annotations** - In this row, only the **View** and **Edit** checkboxes are available. Select the user rights to the **Annotate** menu option on the constituent record.

Reports are unaffected by "object level" security settings such as these. For example, if you grant full rights on the **CONSTITUENT** row of the grid, but unmark **View** in the **Appeals** and **Solicitor Details** rows to deny view rights, when the user opens a constituent record, the Appeals tab does not appear on the constituent record and the solicitor **Details** button on the Bio 1 tab is disabled. When the user runs a query, appeal and solicitor detail information does not appear in filter lists or on results, but the information does appear in reports.

Note: To enable the Convert to Organization menu item on the Bio 1 tab of the constituent record, users must have rights to both **Ethnicity** and **Religion**. When the user converts an individual record to an organization record, data from these fields moves to a notepad so the user can access the data. This does not affect the **Convert to Individual** menu option on the Org 1 tab.

8. In the **Miscellaneous Constituents Options** box, assign field level security for selected fields on the constituent record. To grant the group has total access to a field, mark its checkbox. To deny the group access to a field, unmark its checkbox.

- **Target**

- **Income**

- **Ethnicity**

- **Religion**

- **Solicitor Performance Summary**

- **Gift Summary**

If you mark **Solicitor Performance Summary** or **Gift Summary**, the user can view the report even if he is denied rights to run the reports through the **Reports** checkbox in the **Group Privileges** grid.

If you use field level security to deny rights to information, the user cannot use that information as filter or sort criteria in new queries or access existing queries that use the information as filter or sort criteria. Credit card information does not appear in profiles, but all other reports are unaffected and do contain information from restricted fields. Mail functions are unaffected by field level security.

Users cannot use a restricted field for data entry in constituent or gift batches or access existing batches that use restricted fields. Users without access to any of these fields cannot import records that contain values in the fields. If they try to do so, the records create exceptions. Users cannot export restricted fields or run existing exports that contain restricted fields.

9. In the **Record Types** box, select the next record type for which to establish security, or click **OK** to save your settings and return to the New Group screen.

Biographical Security Details

Warning: Biographical security is not intended to be program-wide. It affects only records. Users with the appropriate rights in *Query*, *Export*, *Reports*, *Mail*, or *Administration* can view or edit the information in those areas of the program.

Biographical security limits user access to information from some fields and items on the Bio 1, Bio 2, Org 1, and Org 2 tabs in constituent records and still provides access to the information in other areas of *The Raiser's Edge*. It is important to keep in mind that even though you may limit access to biographical information in records, users with the appropriate rights can still view or edit the information in *Query*, *Export*, *Reports*, *Mail*, or *Administration*. Additionally, these settings do not affect *VBA for Advanced Customization* or *API for Advanced Application Development*.

You can use biographical security in several ways. For example, you can give a group of users rights to add notes to constituent records, but not give them rights to edit other information on the constituent record. However, to completely eliminate access to certain constituent records in all areas of *The Raiser's Edge*, you can eliminate access to records with specific constituent codes. For more information about this, see "Security by Constituency" on page 213.

If you unmark **Edit** in the **Biographical** row, users cannot edit this information on the Bio 1 or Org 1 tab:

Last name	Marital status
First name	Solicit code(s)
Middle name	Organization matches gifts
Titles	Factor
Suffixes	Fiscal year starts
Alias	Per gift Minimum
Alias Type	Per gift Maximum
Nickname	Annual per donor Minimum
Maiden name	Annual per donor Maximum
ID	Total per donor Minimum
Gender	Total per donor Maximum
SSN	Is inactive
Birth date	Gives anonymously
Deceased?	Requests no email
Deceased date	Is a solicitor

Because they are controlled by other security options (such as Address and Relationships), these items are still available: the **Spouse** field; constituent address fields; the **Has no valid addresses** checkbox; and the **Bank**, **Education**, and **Business** buttons. To limit access to these items, unmark the appropriate individual relationship, organization relationship, or address rights.

If you unmark **Edit** in the **Biographical** row, users cannot edit this information on the Bio 2 or Org 2 tab:

Target	No. subsidiaries
Income	Card Type
Receipt type	Credit Card No.
Birthplace	Expiration
Religion	Reference
Ethnicity	Description (Constituent Code)
Industry	Code
Parent corp.	Date From
No. employees	Date To

When you unmark **Edit**, users can create new gift batches and open existing ones, but all fields in the constituent window are view only. The information that appears in record searches is unaffected. Participant (if you have *Event Management*) and tribute acknowledgee (if you have *Honor/Memorial Tracking*) information is also not affected.

If a user does not have full biographical security rights (as well as Address and Addressee/Salutation rights), the **Convert to Organization** menu option on the constituent record is not available.

Want to know more about security for "Constituents Security" on page 181?

Address Security Details

Address security provides increased flexibility to grant rights to address information on the constituent record. For example, you have a group of workers whose sole function is to update addresses. You can grant them access to only the Addresses tab of the constituent record. With address security, it is important to note that even though you may limit access to address information in records, users with the appropriate rights can still view or edit the information in *Query*, *Export*, *Reports*, *Mail*, or *Administration*. Additionally, address security settings do not affect *VBA for Advanced Customization* or *API for Advanced Application Development*.

View Rights

If you unmark **View** on the **Address** row:

- The Addresses tab does not appear on constituent records.
- On the Bio 1 or Org 1 tab, no preferred address information appears, and the **Has no valid addresses** checkbox is not enabled.
- On relationship and participant records (available in *Event Management*), information in the address frame is not visible.
- Acknowledgees for tributes (available in *Honor/Memorial Tracking*) must be relationships on the Honor/Memorial's record, but they do not have to be constituents. If an acknowledgee is not a constituent, the **Address lines** field is required to save the relationship record. Users without **View** rights to addresses cannot access the **Address lines** field; therefore, users who do not have address **View** rights cannot add non-constituent acknowledgees.
- In batches, the **Address Lookup** and **Address Correction** menu options are not available. The **New Gift Batch** and **Open** options are available on the action bar, but the constituent window is turned off.
- On Open screens, no address information appears in search results. Also, because the default search query contains address information, users without **View** rights for addresses cannot use it for searches. When users without **View** rights attempt to use the default query, a message appears informing them that they are not authorized to view fields in the query and that they must select another.

Add Rights

If you unmark **Add** on the **Address** row, the **File**, **New** menu command and **New Address** button in the action bar are disabled. Because users can still edit existing addresses, for consistency we recommend you always unmark **Edit** when you unmark **Add**.

When you unmark **Add**, you affect only non-preferred addresses. When the user saves a new constituent record without a user defined address, *The Raiser's Edge* creates a default preferred address (which may consist of no more than the default entry in the **Country** field). A user without **Add** rights for addresses who creates a constituent record can still simply save a record to "add" a preferred address.

The **Add** checkbox does not affect preferred addresses. Because batches, participants (available in *Event Management*), and tribute acknowledgees (available in *Honor/Memorial Tracking*) use the preferred address, unmarking the **Add** checkbox does not affect them.

Edit Rights

When you unmark **Edit** in the **Address** row, the user group cannot edit **Preferred Address** and **Has no valid addresses** on the Bio 1 or Org 1 tab or addresses, as well as any additional address or phone information, on the Addresses tab. On the action bar, **Open** is available; however, if the user attempts to save an edited address, a message appears to inform him that he does not have security rights to edit the address.

Edit rights affect all addresses, including business addresses, contact addresses, relationship addresses, and participant addresses (if you have *Event Management*). With *Honor/Memorial Tracking*, addresses for existing acknowledgees on the Relationships tab are view only. If an acknowledgee is not a constituent, the **Address lines** field is required to save the relationship record. Because users cannot edit this field or add information to it, acknowledgees who are not constituents cannot be added. For participants, the address is view only on existing records and is not required and cannot be changed on new participants.

In batches, the **Address Lookup** and **Address Correction** menu options are disabled. The **New Gift Batch** and **Open** options on the action bar are enabled, but all fields in the constituent window are view only.

Delete Rights

Because preferred addresses cannot be deleted, the **Delete** checkbox in the **Address** row affects only non-preferred addresses. When you unmark this checkbox, **Delete** on the action bar, in the menu bar, and on the toolbar are disabled so users cannot delete addresses.

Unmarking the **Delete** checkbox does not affect preferred addresses. Therefore, batches, participants (*Event Management*), and tribute acknowledgees (*Honor/Memorial Tracking*) are not affected because they all use the preferred address.

Want to know more about security for "Constituents Security" on page 181?

Addressee/Salutation Security Details

When you unmark **Edit** in the **Addressee/Salutation** row, **Primary addressee**, **Primary salutation**, **Editable?**, and additional addressee/salutation information are view only. The **Test Label Truncation** button is still available, but the fields on the Test Label Truncation screen are view only.

In batches, the **New Gift Batch** and **Open** options are available on the action bar, and all fields in the constituent window are view only.

For tribute acknowledgees (available in *Honor/Memorial Tracking*), if the relationship is a constituent, the same fields as on the Addressee/Salutation tab of the constituent record appear on the relationship record. Therefore, these fields on the General 2 tab are view only: **Primary addressee**, **Primary salutation**, **Editable?**, and additional addressee/salutation information. The **Test Label Truncation** button is enabled, but fields on the report are view only.

Want to know more about security for "Constituents Security" on page 181?

Gifts Security

> **Note**: If a group is given rights to gifts through **Records**, but denied rights to gifts in a certain fund through Gift Security by Fund, the group is denied rights to the gifts in that fund.

To assign security rights to gifts for a group, you can grant or deny view, add, edit, or delete rights for the entire record.

▶ **Assign security rights to gift records**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. From the **Record Types** box, select **Gifts**. The **Gift Privileges** grid and **Miscellaneous Gifts Options** box appear.
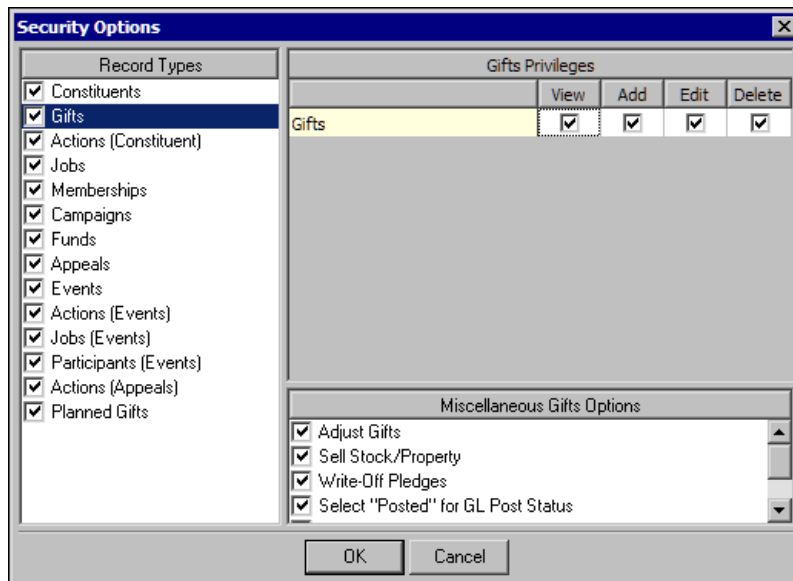
7. In the **Gifts Privileges** grid, assign view, add, edit, or delete rights for the entire record type. No specific tab category security is used. All rights default to marked. If you mark **Gifts** in the **Record Types** box, then the group automatically has view rights. If you unmark **View**, the program automatically unmarks **Add**, **Edit**, and **Delete**.

8. In the **Miscellaneous Gifts Options** box, mark checkboxes to grant the user group object level security rights to gifts. You can mark **Adjust Gifts**, **Sell Stock/Property**, **Write-Off Pledges**, **Select "Posted" for GL Post Status**, **Select "Do Not Post" for GL Post Status**, or **Amend Recurring Gifts**.

    If you grant full rights to gifts through object level security, but limit rights through Fund system level security, gifts to the restricted fund are restricted in all areas of the program because system level security takes precedence over object level security.

    If you use object level security to deny rights to gifts through **Gifts** in the **Record Types** box, you can still allow users to access some gifts. For example, even if you unmark **Gifts** in the **Record Types** box to deny **View** rights, you can still allow users to view gifts to campaigns (or funds and appeals). When you mark **Campaigns** in the **Record Types** box, mark **View Gifts** in the **Miscellaneous Campaigns Options** box so users can view gifts for a campaign.

9. In the **Record Types** box, select the next record type for which to establish security, or click **OK** to save your settings and return to the New Group screen.

Actions (Constituent) Security

To assign security for constituent actions, you can grant or deny view, add, edit, or delete rights for the entire record. You can also specify security for constituent action tracks.

Note: To enable synchronization with Microsoft *Outlook* 2000 or greater tasks and calendar appointments, users must have full security rights to action records.

Users with Microsoft *Outlook* 2000 or greater can synchronize *Raiser's Edge* action records with *Outlook* tasks and calendar appointments. To enable synchronization with these records, users must have full security rights to action records.

▶ **Assign security rights to constituent actions**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. In the **Record Types** box, select **Actions (Constituent)**. The **Actions (Constituent) Privileges** grid and **Miscellaneous Actions (Constituent) Options** box appear.

7. In the **Actions (Constituent) Privileges** grid, assign view, add, edit, or delete rights for the entire record type. No specific tab category security is used. All rights default to marked. If you mark **Actions (Constituents)** in the **Record Types** box, the group automatically has view rights. If you unmark **View**, the program automatically unmarks **Add**, **Edit**, and **Delete**.

8. In the **Miscellaneous Actions (Constituent) Options** box, select whether the user group can assign or define constituent action tracks. If you do not mark **Add** in the **Actions (Constituent) Privileges** grid, **Assign Constituent Action Tracks** is locked as unmarked.

9. In the **Record Types** box, select the next record type for which to establish security, or click **OK** to save your settings and return to the New Group screen.

Jobs Security

If you have *Volunteer Management*, job records are available. To assign security for jobs, you can grant or deny view, add, edit, or delete rights for the entire record.

▶ **Assign security rights to job records**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.
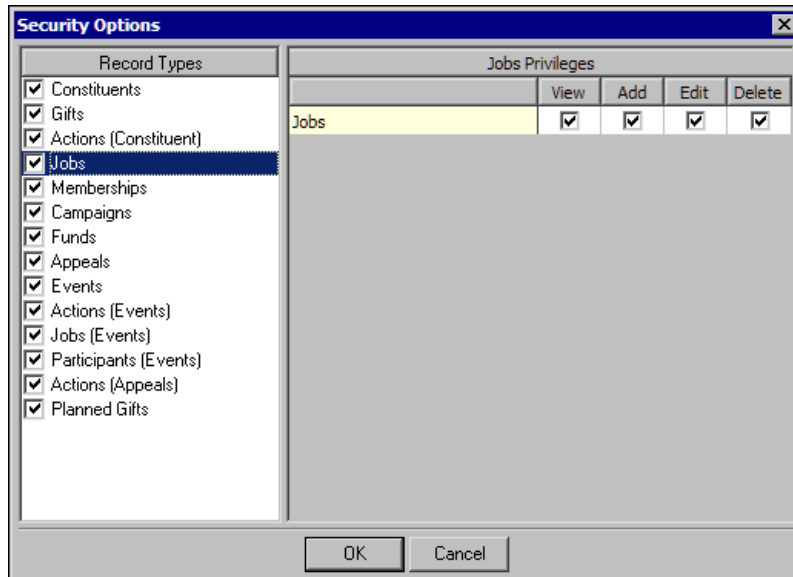
6. In the **Record Types** box, select **Jobs**. The **Jobs Privileges** grid appears.

7. In the **Jobs Privileges** grid, assign view, add, edit, and delete rights for the entire record type. No specific tab category security is used. All rights default to marked. If you mar **Jobs** in the **Record Types** box, then the group automatically has view rights. If you unmark **View**, the program automatically unmarks **Add**, **Edit**, and **Delete**.

8. In the **Record Types** box, select the next record type for which to establish security, or click **OK** to save your settings and return to the New Group screen.

Memberships Security

If you have *Membership Management*, membership records are available. To assign security for memberships, you can grant or deny view, add, edit, or delete rights for the entire record.

▶ **Assign security rights to membership records**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.
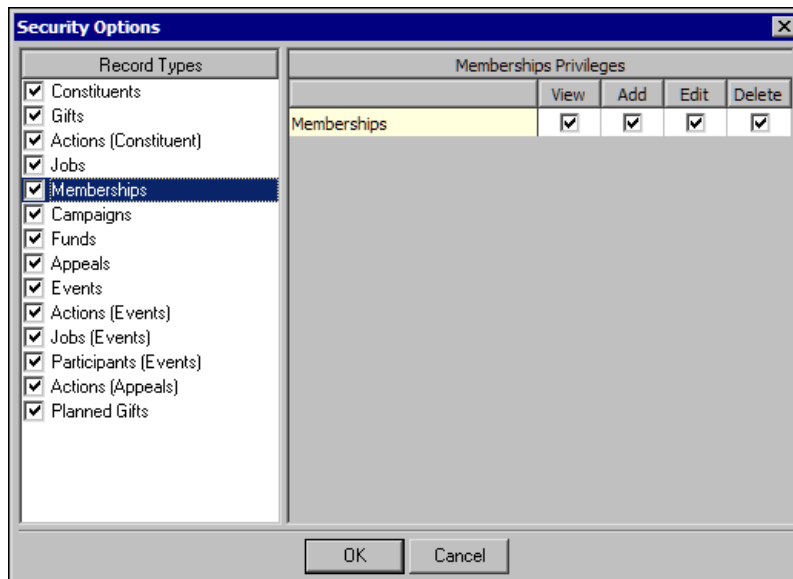
6. From the **Record Types** box, select **Memberships**. The **Memberships Privileges** grid appears on the right.

7. In the **Memberships Privileges** grid, assign view, edit, add, or delete rights for the entire record type. No specific tab category security is used. All rights default to marked. If you mark **Memberships** in the **Record Types** box, the group automatically has view rights. If you unmark **View**, the program automatically unmarks **Add**, **Edit**, and **Delete**.

8. In the **Record Types** box, select the next record type for which to establish security, or click **OK** to save your settings and return to the New Group screen.

Campaigns Security

You can assign rights to the solicitor hierarchy, gifts, and summaries for a campaign.

You can also assign rights for the Giving Hierarchy.

▶ **Assign security rights for campaign records**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. In the **Record Types** box, select **Campaigns**. The **Campaigns Privileges** grid and **Miscellaneous Campaigns Options** box appear.

Note: To give a group rights to campaigns, funds, or appeals, but not to other records, unmark all other checkboxes in the **Record Types** box on the Security Options screen.

Because campaigns are associated with so many other records, when you mark **Records** on the New Group screen, users automatically receive view rights for campaign records. In the **Campaigns Privileges** grid, the **View** column is locked as N/A (not applicable) in the **CAMPAIGNS** row.

7. In the **Campaigns Privileges** grid, assign rights to campaigns.

- In the **CAMPAIGNS** row, assign rights to add, edit, and delete campaigns.

- In the **Solicitor Hierarchy** row, assign rights to view, add, edit, and delete entries on the tree view that lists solicitors for a campaign.

- In the **Giving Hierarchy** row, assign rights to view or edit the Giving Hierarchy. If you do not mark **View**, the Giving Hierarchy tab does not appear on campaign records.

Note: If system level restrictions are set on gifts by funds, users cannot view gifts for funds associated with the campaign, and the gifts do not appear on campaign summaries.

8. To give the group security rights to view gifts, in the **Miscellaneous Campaigns Options** box, mark **View gifts**. With these rights, a user can view gifts to campaigns, even if view rights in **Gifts** are not granted.

9. To give the group security rights to view fund summaries, mark **View Campaign Summary**. With these rights, a user can view a Campaign Summary even if he is denied rights to run the report.

10. In the **Record Types** box, select the next record type for which to establish security, or click **OK** to save your settings and return to the New Group screen.

Funds Security

You can assign rights to the solicitor hierarchy, gifts, and summaries for a fund. You can also specify rights for fund relationships with constituents.

▶ **Assign security rights for fund records**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. In the **Record Types** box, select **Funds**. The **Funds Privileges** grid and **Miscellaneous Funds Options** box appear.

Note: To give a group rights to campaigns, funds, or appeals, but not to other records, unmark all the checkboxes in the **Record Types** box on the Security Options screen.

Because funds are associated with so many other records, when you mark **Records** on the New Group screen, users automatically receive view rights for fund records. In the **Funds Privileges** grid, the **View** column is locked as N/A (not applicable) in the **FUNDS** row.

7. In the **Funds Privileges** grid, assign rights to funds:

   • In the **FUNDS** row, assign rights to add, edit, and delete funds.

   • In the **Solicitor Hierarchy** row, assign rights to view, add, edit, and delete entries on the tree view that lists solicitors for a fund.

   • In the **Relationships - Individuals** and **Relationships - Organizations** rows, assign rights for these relationships with fund records. If you unmark **View** on both rows, the Relationships tab does not appear on fund records for users in this group.

8. To give the group security rights to view gifts, in the **Miscellaneous Funds Options** box, mark **View gifts**. With these rights, a user can view gifts to funds, even if view rights in **Gifts** are not granted.

9. To give the group security rights to view fund summaries, mark **View Fund Summary**. With these rights, a user can view a Fund Summary even if he is denied rights to run the report.

10. In the **Record Types** box, select the next record type for which to establish security, or click **OK** to save your settings and return to the New Group screen.

Appeals Security

You can assign rights to the solicitor hierarchy, gifts, and summaries for an appeal.

▶ **Assign security rights for appeal records**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. In the **Record Types** box, select **Appeals**. The **Appeals Privileges** grid and **Miscellaneous Appeals Options** box appear.

    Because appeals are associated with so many other records, when you mark **Records** on the New Group screen, users automatically receive view rights for appeal records. In the **Appeals Privileges** grid, the **View** column is locked as N/A (not applicable) in the **APPEALS** row.

Note: To give a group rights to campaigns, funds, or appeals, but not to other records, unmark all the checkboxes in the **Record Types** box on the Security Options screen.

7. In the **Appeals Privileges** grid, assign rights to appeals:

    • In the **APPEALS** row, assign add, edit, or delete rights for appeals.

    • In the **Solicitor Hierarchy** row, assign rights to view, add, edit, and delete entries on the tree view that lists solicitors for an appeal.

8. To give the group security rights to view gifts, in the **Miscellaneous Appeals Options** box, mark **View gifts**. With these rights, a user can view gifts to appeals, even if view rights in **Gifts** are not granted.

9. To give the group security rights to view appeal summaries, mark **View Appeal Summary**. With these rights, a user can view an Appeal Summary even if he is denied rights to run the report.

10. In the **Record Types** box, select the next record type for which to establish security, or click **OK** to save your settings and return to the New Group screen.

Events Security

If you have *Event Management*, event records are available. For event records, you can set tab level security privileges. You can also set view rights for event summaries.

▸ **Assign security rights for event records**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. In the **Record Types** box, select **Events**. The **Events Privileges** grid and **Miscellaneous Events Options** box appear.

7. In the **Events Privileges** grid, assign view, add, edit, or delete rights for the entire record type. If you mark **Events** in the **Record Types** box, then the group automatically has view rights. If you unmark **View** in the **EVENTS** row, the program automatically unmarks **Add**, **Edit**, and **Delete**.

Note: Rights to view actions control the access to the Event Tickler Report. Access to the Event Count Summary is based on rights to the Event Tally Report assigned through the **Reports** checkbox in the **Group Privileges** grid.

All other rows represent tabs within the record type. You can allow a user to view a record type while at the same time restricting access to tabs within that record type. If this is the case, restricted tabs do not appear on the event record. In the grid, if users do not have access to View rights to a tab, they cannot perform any actions on that tab. For event records, assign rights to view, add, edit, and delete the following:

- **Events** - you can assign rights to the Events tab, and the **Menu**, **Benefits**, and **Awards** options on the Events menu.

- **Prices**

- **Expenses**

- **Attributes**

- **Media**
- **Notes**
- **Annotations**
- Awards
- Dinner Menu
- Seating

Note: Access to the Actions and Jobs tabs from the event record is controlled by your settings for those record types. For example, if a user does not have rights to view event actions, the Actions tab does not display on the event record.

8. In the **Miscellaneous Events Options** box, mark checkboxes to grant the user group object level security rights to gifts. You can mark **View Goal Summary**, **View Financial Summary**, **Calendar**, **Gift Defaults**, and **Update Participants**.

9. In the **Record Types** box, select the next record type for which to establish security, or click **OK** to save your settings and return to the New Group screen.

Actions (Events) Security

If you have *Event Management*, actions for event records are available. To assign security for actions for events, you can grant or deny view, add, edit, or delete rights for the entire record. You can also specify security for event action tracks.

Note: To enable synchronization with Microsoft *Outlook* 2000 or higher tasks and calendar appointments, users must have full security rights to action records.

Users with Microsoft *Outlook* 2000 or higher can synchronize **Raiser's Edge** action records with *Outlook* tasks and calendar appointments. To enable synchronization with these records, users must have full security rights to action records.

▶ **Assign security rights to event actions**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. In the **Record Types** box, select **Actions (Events)**. The **Actions (Events) Privileges** grid and **Miscellaneous Actions (Events) Options** box appear.

7. In the **Actions (Events) Privileges** grid, assign view, add, edit, or delete rights for the entire record type. No specific tab category security is used. If you mark **Actions (Events)** in the **Record Types** box, the group automatically has view rights. If you unmark **View**, the program automatically unmarks **Add**, **Edit**, and **Delete**.

8. In the **Miscellaneous Actions (Events) Options** box, select whether the user group can assign or define event action tracks. If you do not mark **Add** in the **Actions (Events) Privileges** grid, these checkboxes are locked as unmarked.

9. In the **Record Types** box, select the next record type for which to establish security, or click **OK** to save your settings and return to the New Group screen.

Jobs (Events) Security

If you have *Event Management* and *Volunteer Management*, jobs for event records are available. To assign security for jobs for events, you can grant or deny view, add, edit, or delete rights for the entire record.

▸ **Assign security rights to event job records**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.
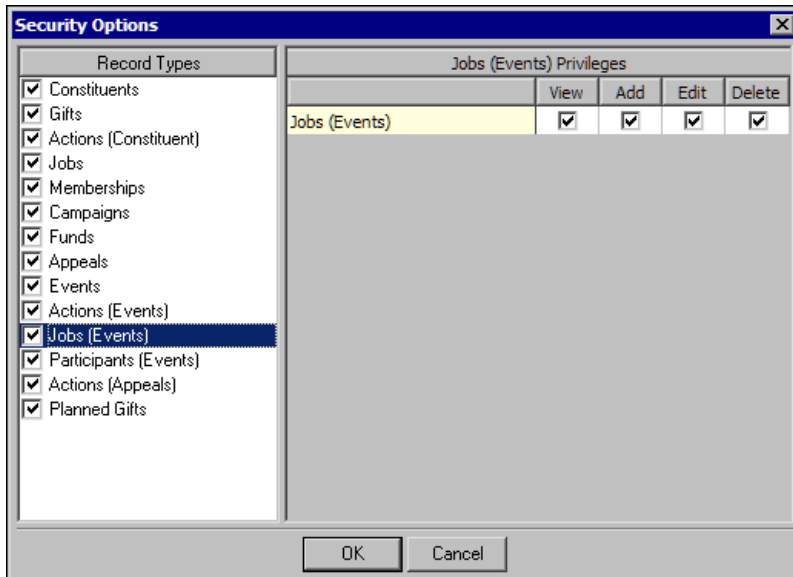
6. In the **Record Types** box, select **Jobs (Events)**. The **Jobs (Events) Privileges** grid appears.

7. In the **Jobs (Events) Privileges** grid, assign view, add, edit, or design rights for the entire record type. No specific tab category security is used. If you mark **Jobs (Events)** in the **Record Types** box, the group automatically has view rights. If you unmark **View**, the program automatically unmarks **Add**, **Edit**, and **Delete**.

8. In the **Record Types** box, select the next record type for which to establish security, or click **OK** to save your settings and return to the New Group screen.

Participants (Events) Security

If you have *Event Management*, participant records are available. For participant records for your events, you can set tab level security privileges.

▶ **Assign security rights for participant records**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. In the **Record Types** box, select **Participants (Events)**. The **Participants (Events) Privileges** grid appears.

7. In the **Participants (Events) Privileges** grid, assign view, add, edit, or delete rights for the entire record type. If you mark **Participants (Events)** in the **Record Types** box, the group automatically has view rights. If you unmark **View** in the **PARTICIPANTS** row, the program automatically unmarks **Add**, **Edit**, and **Delete**.

All other rows represent tabs within the record type. You can allow a user to view a record type while at the same time restricting access to tabs within that record type. If this is the case, restricted tabs do not appear on the participant record. In the grid, if users do not have access to View rights to a tab, they cannot perform any actions on that tab. For participant records, you can assign rights to view, add, edit, and delete the following:

- **General**
- **Travel**
- **Participation**
- **Registration Fees**
- **Donations**
- **Sponsoring Pledges**
- **Attributes**
- **Notes**

8. In the **Record Types** box, select the next record type for which to establish security, or click **OK** to save your settings and return to the New Group screen.

Actions (Appeals) Security

To assign security for actions for appeals, you can grant or deny view, add, edit, or delete rights for the entire record. You can also specify security for event action tracks.

Note: To enable synchronization with Microsoft *Outlook* 2000 or greater tasks and calendar appointments, users must have full security rights to action records.

Users with Microsoft *Outlook* 2000 or greater can synchronize action records in *The Raiser's Edge* with tasks and calendar appointments in *Outlook*. To enable synchronization with these records, users must have full security rights to action records.

▶ **Assign security rights for appeal actions**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

6. In the **Record Types** box, select **Actions (Appeals)**. The **Actions (Appeals) Privileges** grid and **Miscellaneous Actions (Appeals) Options** box appear.

7. In the **Actions (Appeals) Privileges** grid, assign view, add, edit, or delete rights for the entire record type. No specific tab category security is used. If you mark **Actions (Appeals)** in the **Record Types** box, the group automatically has view rights. If you unmark **View**, the program automatically unmarks **Add**, **Edit**, and **Delete**.

8. In the **Miscellaneous Actions (Appeals) Options** box, select whether the user group can assign or define appeal action tracks. If you do not mark **Add** in the **Actions (Appeals) Privileges** grid, these checkboxes are locked as unmarked.

9. In the **Record Types** box, select the next record type for which to establish security, or click **OK** to save your settings and return to the New Group screen.

Planned Gifts Security

Note: If a user who does not have security rights to planned gifts attempts to create a new gift with a default set that includes the planned gift type, a message appears to allow the user to select whether to create the gift without that gift type or not create the gift at all.

If you have *Planned Giving*, planned gift records are available. To assign security for planned gifts, you can grant or deny view, add, edit, or delete rights for this gift type. These privileges enable you to prevent unauthorized users from viewing or editing gifts with the gift type of "Planned Gift." The default setting is for users to have only view rights; if you change this to deny users view rights to these gifts, they are not included in queries, reports or dashboards for those users.

View rights for constituent relationship types (such as individual, organization, bank, or education) are bypassed when looking at the relationships/beneficiaries grid on a planned gift. For example, a user without view rights to a certain relationship type cannot access that type on the Relationships tab on the constituent record, but the user can still see them in the Relationship/Beneficiary grid on a planned gift. This is consistent with how security is handled in other areas (for example, a user without view rights for events can still see event data from the **Gift**, **Link to Event** menu item). We recommend that if you allow users rights to view planned gifts, that you also allow rights to view relationships.

▸ **Assign security rights for planned gifts**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **Records**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.
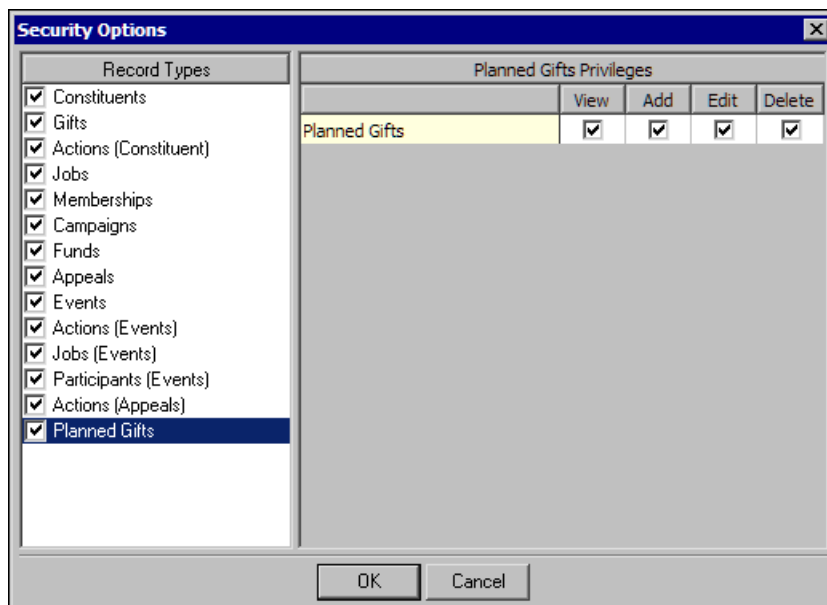
6. In the **Record Types** box, select **Planned Gifts**. The **Planned Gifts Privileges** grid appears.

7. In the **Planned Gifts Privileges** grid, assign view, add, edit, or delete rights for the entire record type. All rights default to unmarked.

8. In the **Record Types** box, select the next record type for which to establish security, or click **OK** to save your settings and return to the New Group screen.

Query Security

Security for *Query* is defined on only one level. If you mark **Query** in the **Group Privileges** box on the New Group screen, the members of the new group have access to *Query*.

Unmarking the checkbox does not affect the ability of group members to select queries in other areas of the program, but the users cannot add a new query from the Open screen. The group members can still create an output or exception query from reports and other processes.

Want to see the other "Security Types" on page 178?

Export Security

Security for *Export* is defined on only one level. If you mark **Export** in the **Group Privileges** box on the New Group screen, the members of the group can access *Export*.

Want to see the other "Security Types" on page 178?

Reports Security

> **Note**: Security for reports controls the ability of a user to run them from anywhere in the program.

You can control which reports a security group can run. Data entry and view rights do not affect the information that appears on reports. If a user has rights to run a report, the user has rights to all information on that report, including records restricted through object level security (such as Records). However, system level security restrictions (such as Gift Security by Fund for example) do limit the information that appears on reports.

▶ **Assign reports security privileges**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **Reports**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.
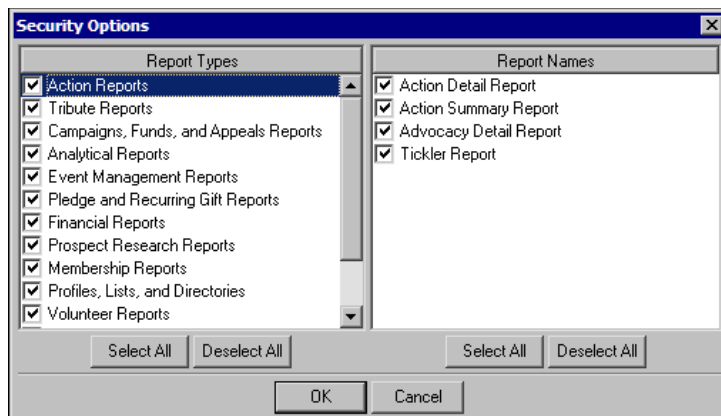
6. Select the reports the user group can run. By default, a new group can run all reports.

   a. In the **Report Types** box, select the type of report to select.

   b. In the **Report Names** box, mark the checkbox for the reports the group can run. for that type list in the box on the right. For more information the report types and individual reports within each type, see the *Reports Guide*.

7. To save your settings, click **OK**. You return to the New Group screen.

> **Warning**: Records restricted through object level security still appear in reports; however, records restricted by system level security do not appear in reports.

Records restricted through object level security still appear in reports, and records restricted by system level security do not. For example, if a user has rights to the First/Latest/Greatest Gift Report in **Analytical Reports**, but does not have view rights to gifts through records security, all gifts that meet the criteria for the report appear in the report anyway. However, if a user has system level restrictions through Gift Security by Fund or Security by Constituency, gifts associated with restricted funds and with constituents with restricted codes do not appear on the report. If the restricted code appears only on the gift record, not the constituent record, the gift appears in reports.

If you deny rights to certain reports, the user cannot run them from anywhere in the program. For example, if you select **Campaign, Fund, and Appeal Reports** and unmark the **Appeal Summary List**, the user cannot run the report. To allow users to view, but not run, appeal summaries, mark **View Appeal Summary** on the Security Options screen for appeals.

Mail Security

You can assign security for all mailing functions in *The Raiser's Edge*. Data entry and view rights do not affect rights to information in mailing options. If a user has rights to perform a mailing function, the user has rights to all information included in that function, including records restricted through object level security. However, system level security restrictions do limit the information that appears in mailings.

▸ **Assign mail security privileges**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

> **Note**: If you unmark **Mail** on the New Group screen, you deny all rights to all mailing functions for the group.

4. Under **Group Privileges**, select **Mail**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.
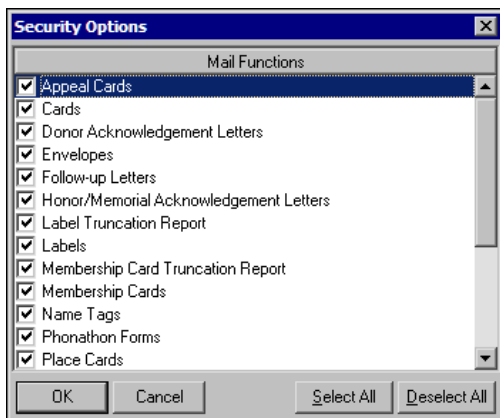
6. Select the mailing functions the security group can access. For more information about mailing functions in *The Raiser's Edge* and what each does, see the *Mail Guide*.

7. To save your settings, click **OK**. You return to the New Group screen.

Batch Security

You can assign security rights for constituent and gift batches. If you have *Volunteer Management*, you can assign rights for time sheet batches. You can also assign rights to access *Electronic Funds Transfer* to process credit card and direct debit transactions.

▶ **Assign batch security privileges**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

Note: If you unmark **Batch**, you deny rights to all batch functions for the group.

4. Under **Group Privileges**, select **Batch**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.
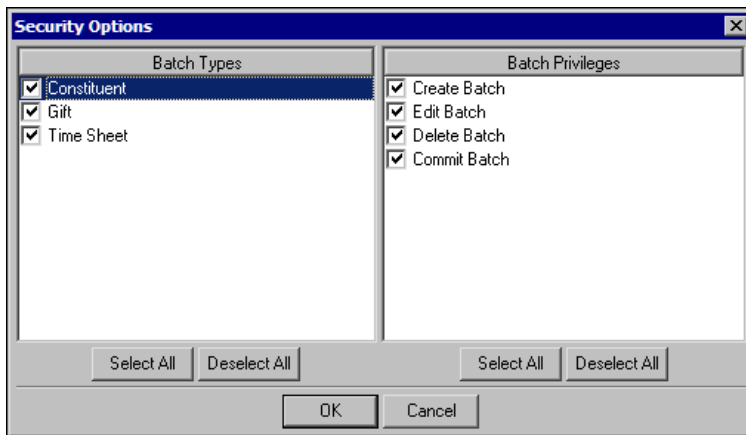
Note: The options in the **Batch Privileges** box are the same for both constituent and gift batches except you can **Change Batch Projections** only for gift batches.

6. Set the security rights for constituent batches.

   a. In the **Batch Types** box, select **Constituent**.

   b. In the **Batch Privileges** box, select whether the group can create, edit, delete, or commit constituent batches.

   To deny all rights to constituent batches, unmark **Constituent** in the **Batch Types** box.

7. Set the security rights for gift batches.

   a. In the **Batch Types** box, select **Gift**.
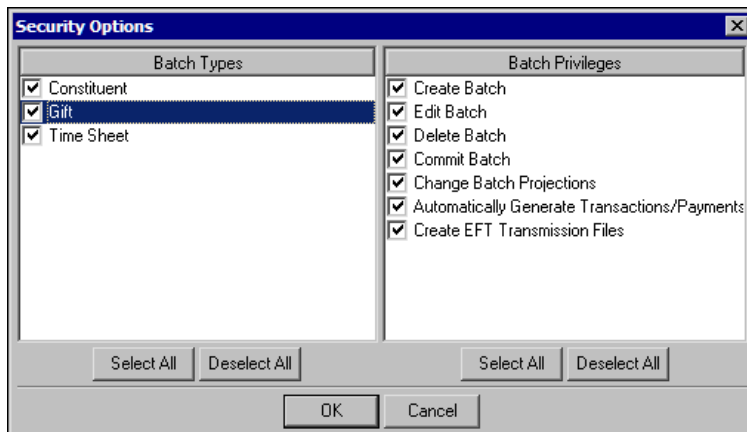
b. In the **Batch Privileges** box, select whether the group can create, edit, delete, or commit gift batches or change batch projections. If you use *Electronic Funds Transfer*, select whether the group can automatically generate transactions and payments or create transmission files.

To deny all rights to gift batches and *Electronic Funds Transfer*, unmark **Gift** in the **Batch Types** box.

8. If you have *Volunteer Management*, set the security rights for time sheet batches.

a. In the **Batch Types** box, select **Time Sheet**.
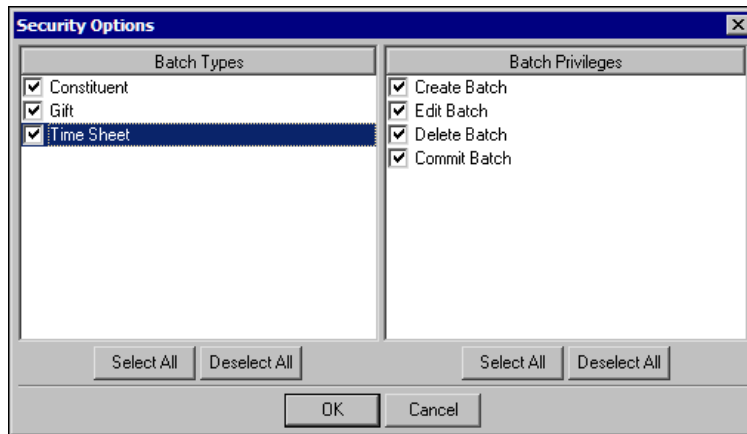
b. In the **Batch Privileges** box, select whether the group can create, edit, delete, or commit time sheet batches.

To deny all rights to time sheet batches, unmark **Time Sheet** in the **Batch Types** box.

9. To save your settings, click **OK**. You return to the New Group screen.

Mapping Security

Security for the integration with Microsoft *MapPoint* is defined on only one level. If you mark **Mapping** in the **Group Privileges** box on the New Group screen, the members of the new group can access *Mapping*. If you unmark the checkbox, the **Mapping** link on the Raiser's Edge bar does not appear, and users cannot access the Mapping page.

Want to see the other "Security Types" on page 178?

Administration Security

Warning: Because **Administration** functions have far reaching implications, we recommend that you grant only experienced users access to this area of the program. If you grant any users access to *Administration*, you should unmark **Security** so they cannot enter Security and change their own rights.

You can assign security rights for all administrative functions, including to import data, add security groups, and globally delete data.

▶ **Assign administration security privileges**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **Administration**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.

Note: Even if you mark **Import** in the **Administration Security Options** box, the **Import** link does not appear on the Administration page if the user does not have rights to data based on object level, system level, or field level security.

6. The **Administration Security Options** box lists each administration function as a checkbox. Each defaults to marked, giving access rights to the group. To deny the group rights to a function, unmark its checkbox. The checkboxes in the **Administration Security Options** box vary depending on the features you have. For example, if you have *Queue for Task Scheduling*, it appears as a checkbox.

    Even if you mark **Administration** in the **Group Privileges** grid, system level security can limit the effectiveness of the functions. For example, if you grant rights to **Globally Write Off Pledges**, but restrict access to constituents through inclusion or exclusion or to gifts through Fund security, the user group cannot write off pledges associated with restricted constituents or funds. When the users try to globally write off pledges, a warning message appears to state that system level security restricts their access to some records in *The Raiser's Edge* and that Globally Write Off Pledges will not affect records the user cannot access.

Warning: If a user has rights to **Post to General Ledger**, but restricted rights to gifts, the user may still be able to view some restricted gift information. We recommend any users who are restricted from gift privileges in any way not have rights to Post to GL.

    If the user runs the **Globally Write Off Pledges** function anyway, a warning message appears at the bottom of exception reports to state that some information has not been written off due to security restrictions.

7. To save your settings, click **OK**. You return to the New Group screen.

Configuration Security

You can assign the group rights to configuration options. Take special care to limit configuration access to only several key users.

Warning: Because the **Fields** link in *Configuration* is available to only those users with Supervisor rights, it does not appear as a checkbox in the **Configuration** box. If you unmark **Configuration** on the New Group screen, you deny rights to all configuration functions for the group.

▶ **Assign configuration security privileges**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **Configuration**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.
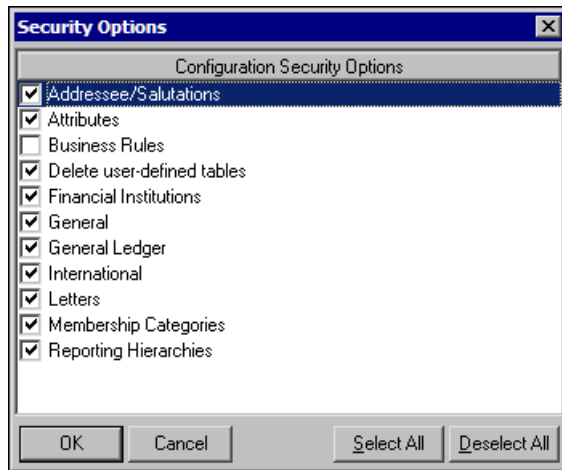
6. The **Configuration Security Options** box lists each configuration security option as a checkbox. Each defaults to marked, giving access rights to the group. To deny the group rights to an option, unmark its checkbox. For information on configuration options and what each does, see the "Configuration" chapter of this book.

7. To save your settings, click **OK**. You return to the New Group screen.

Code Tables Security

You can control whether users can add and edit code table entries. Code tables are fields with a down arrow. When you click the arrow, you can select from a list of entries to place in the field. To help speed and add consistency to your data entry, tables allow users to select an entry in a field rather than type it in manually. If you grant rights to change tables, users can press **F7** on the keyboard while the cursor is in a field to add and edit its table. To limit your table entries to a reasonable number and protect the consistency of your database, we recommend you limit the ability to change tables among your users.

▸ **Assign security privileges for code tables**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **Code Tables**. The checkbox defaults to marked and the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.
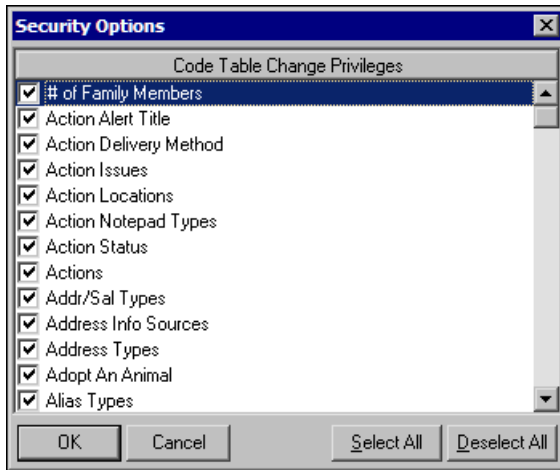
Note: You can make a field a lookup in the **Fields** option of *Configuration*. When a field is made into a lookup, you can define entries for it like a table. The lookup field also appears in the list of code tables in both *Configuration* and **Security**. The new lookup defaults to marked in **Security**, giving users rights to add, edit, and delete entries for it.

6. The **Code Table Change Privileges** box lists each code table in the program as a checkbox. Each defaults to marked, giving access rights to the group to change the table. To deny the group rights to a table, unmark its checkbox.

7. Click **OK** to automatically save your settings and return to the New Group screen.

Code Table Example

If you unmark **Actions**, when a user enters an action such as Phone call or Lunch meeting, he can only select from the entries already defined. To access the list, the user clicks the down arrow or puts the cursor in the field and presses the up or down arrow on the keyboard.

Want to know more about "Code Tables Security" on page 207 security?

Personal Information Security

Use the personal information security options to determine the rights members of a group have to view and edit personal information such as social security numbers, bank account, and insurance policy information. For detailed information about the areas affected by personal information security, see "Personal Information Security Details" on page 209.

We recommend you assign users as few right to personal information as possible to enable them to perform their job functions. For information about best practices when assigning rights to personal information, see "Personal Information Best Practices" on page 212.

▸ **Assign personal information security**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **Personal Information Security**. The checkbox defaults to marked and **Options** is enabled.

5. Click **Options**. The Security Options screen appears.
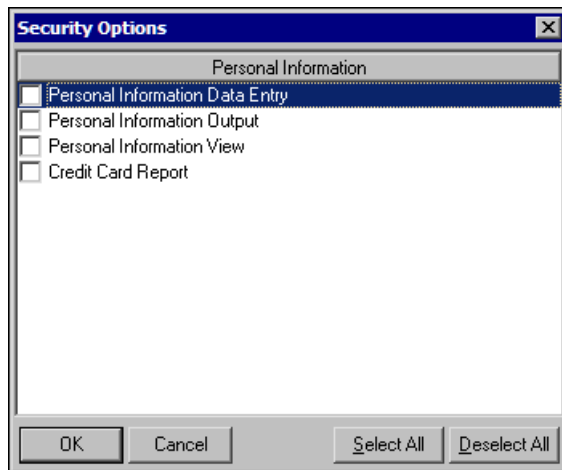
6. Under **Personal Information**, mark the checkboxes to specify rights to personal information. For details about how each of these checkboxes affects the information users can view and edit, see the next section "Personal Information Security Details" on page 209.

7. To save your settings, click **OK**. You return to the New Group screen.

Personal Information Security Details

> **Note**: To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), credit card numbers are always masked in *The Raiser's Edge*, regardless of the personal information security settings.

The following sections detail the areas affected by the four personal information security options.

Personal Information Data Entry Rights

When you mark **Personal Information Data Entry** on the Security Options screen for **Personal Information**, users can add, delete, or change personal information but not view it after they save or output it, such as to a report or an export.

Records

Users can:

• Add, delete, or change credit card information on a constituent or gift.

• Add, delete, or change social security numbers on constituents and relationships.

• Add, delete, or change bank account numbers on a financial institution on a constituent.

• Add, delete, or change insurance policy numbers on a life insurance planned gift record.

In each of these fields, the number is visible while it is being entered, but once the record is saved, the field is masked.

Batch

Users can:

• Enter, delete, or change credit card numbers in a constituent batch or gift batch.

• Enter, delete, or change social security numbers in a constituent batch.

• Enter, delete, or change bank account numbers in a constituent batch.

In each of these fields, the number is visible when entered in the batch. Except for credit card numbers, once the batch is closed and reopened, the field is masked. For credit card numbers, *The Raiser's Edge* automatically masks the field when the user leaves the row in the batch that contains the credit card number. Users without these rights can open the batch, but the fields are masked.

Admin

Users can:

- Globally change credit card fields.
- Globally change social security numbers.
- Enter bank account numbers when globally adding banks.

Import

Users can:

- Import gift credit card information.
- Import social security numbers.
- Import insurance policy numbers.
- Import bank account numbers (in Bank/Financial Institution Imports).

Configuration

Users can enter, delete, or change bank account numbers on financial institutions.

NetSolutions

Users can import *NetSolutions* donations.

Personal Information Output Rights

Note: To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), users cannot output unmasked credit card numbers from *The Raiser's Edge*, regardless of the personal information security settings.

When you mark **Personal Information Output** on the Security Options screen for **Personal Information**, a user can output personal information but not add, remove, change, or view it on records or in batch.

Records

Users can:

- Print Letters with an unmasked social security number (from the **Letters** menu). The number is masked or unmasked based on the format option in export.
- Print Letters with an unmasked bank account number (from the **Letters** menu). The number is masked or unmasked based on the format option in export.

  All other users can print letters with personal information, but the fields are always masked.

Export

Users can:

- Export a file with unmasked social security numbers, unmasked insurance policy numbers, or unmasked bank account numbers.

- Each of these fields has a format option screen to indicate whether the field should be masked or unmasked. The format option screen displays only when a user has personal information output rights, and the numbers are masked or unmasked based on the selected option. For users without output rights, the information is masked (regardless of the option).

Custom View

Users can:

- See social security numbers, insurance policy numbers, and bank account numbers on a custom view.

- For users with personal information output rights, the number is masked or unmasked based on the format option in export. For users without output rights, the information is masked.

Import

Users can:

- Run a constituent or gift import file with credit card information.

- Run a constituent import file with social security numbers.

- Run a bank import with account numbers.

- Run a gift import with insurance policy numbers.

- If a user does not have Personal Information Output rights, the personal information fields can be selected, but the personal information is not included in the file (the field is blank).

Personal Information View Rights

Note: To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), credit card numbers are always masked in *The Raiser's Edge*, regardless of the personal information security settings.

When you mark **Personal Information View** on the Security Options screen for **Personal Information**, the user can view personal information on records and in batch, but cannot add, remove, change, or output the information.

Records

Users can:

- View social security numbers on a constituent or relationship record.

- View bank account numbers on a financial institution on a constituent record.

- View insurance policy numbers on a life insurance planned gift record.

Batch

Users can:

- View social security numbers in a constituent batch.

- View bank account numbers in a constituent batch.

Configuration

Users can view bank account numbers on a financial institution in *Configuration*.

Credit Card Reports Rights

When you mark **Credit Card Report** on the Security Options screen for **Personal Information**, the user can select to preview, print, or export the Credit Card Report or send the Credit Card Report as an email. To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), the credit card numbers in the report are masked, regardless of the personal information security settings.

Personal Information Best Practices

To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), *The Raiser's Edge* automatically masks credit cards numbers. In addition, we recommend that you mask social security numbers, bank account numbers, and insurance policy numbers at all times unless a user has a specific need to see this information to perform their job duties. This means all screens, reports, queries, and exports should mask the data unless a direct need is indicated. The cases listed below demonstrate when a user would need access to the information.

Data Entry

> **Note**: When users edit masked values, the user must replace the entire field so the program can accept the changes to the field. If a user edits a field and leaves some masked values present, a message appears and they cannot save the changed record.

Credit card number. Users can enter a credit card number in a gift batch, constituent batch, constituent record, or gift record. Data entry users need to be able to see a credit card number in a batch or record when they enter the information, but not when they edit a record. When users add or change a credit card number on a gift or in batch, a drop-down menu is available with credit card numbers if a constituent has more than one. The masked credit card number with the last four digits showing appears so the user can select the correct credit card number.

Data entry personnel may also want to print a Batch Validation Report or Gift Entry Validation Report to validate data. The masked version of the credit card number is acceptable for this type of validation. Users cannot print a report with the full credit card number.

Bank account number. users can enter bank account numbers only on a Bank/Financial institution record or a constituent batch. Users can access the Bank/Financial institution record from a constituent record, gift record, or gift batch. The Bank/Financial institution information for your organization is entered in *Configuration*. Users need to be able to see a bank account number while they enter the information in a batch, record, or *Configuration*, but not when they edit. When users add or change a bank (not the bank account field but the bank itself) on a gift, a drop-down menu is available with the bank name and the bank account number. The entire bank account number does not need to appear; users can use the masked bank account number with the last four digits visible to select the correct bank account.

Data entry personnel may also want to print the Batch Validation Report to validate the data (for the constituent batch only, the gift batch validation report prints the bank name but not the bank account number). The masked version of the bank account number is acceptable for this type of validation. It is not a best practice to print a report with the full bank account number.

Social security number. Users can enter social security numbers only on constituent or relationship records, or a constituent batch. When users enter social security numbers in a batch or record, they need to be able to see the number while they enter the information but not when they edit the record.

Insurance policy number. Users can enter insurance policy numbers only on life insurance planned gift records. When users enter insurance policy numbers on a record, they need to be able to see the number while they enter the information but not when they edit the record.

Credit Card/Direct Debit Processing

This includes electronic funds transfer (EFT) processes available in *The Raiser's Edge*, any reports (such as the Credit Card Report), and any custom export files used to transfer files.

Credit card number/Bank account number. When users process EFT transactions with *The Raiser's Edge*, such as to auto-generate transactions and create EFT transmission files, the user cannot view credit card numbers. Likewise, users do not need to view bank account numbers. The main need to view bank account numbers is to process exceptions. We recommend you give users who process exceptions view/data validation rights. The two EFT processes (auto-generate transactions and create EFT transmission files) also have separate security access options.

Print Credit Card Report. Export with bank account number for file formats that *The Raiser's Edge* does not support. While a user may need to export this information for EFT files, when they print letters or mail functions, we recommend bank account numbers be masked. To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), the credit card numbers in the report are masked, regardless of the personal information security settings.

Social security number. Social security numbers are not used in EFT processing.

Insurance policy number. Insurance policy numbers are not used in EFT processing.

View/Data Validation

Bank account number/social security number/insurance policy number. A user who validates data entered needs access to full bank account, or insurance policy numbers. This may or may not be the person who actually enters the data. However, users who process EFT exceptions need to view full bank account numbers. To help you comply with the Payment Card Industry Data Security Standards (PCI DSS), users cannot view full credit card numbers, regardless of the personal information security settings.

Security by Constituency

Note: When you enter a new constituent code, you can indicate whether to include or exclude the code from existing security groups.

To define which groups of constituents users can view or edit, you can use Inclusion and Exclusion criteria. For example, if you do not want users in your data entry security group to access Trustee records, you can use exclusion criteria to deny access to any constituent record that contains that code. If both inclusion and exclusion rights are set up for the same group, exclusion rights take precedence over inclusion rights.

By default, all users have rights to view and edit all constituents.

Want to see some "Security by Constituency Examples" on page 215?

▶ **Assign security by constituency**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.
2. Click **Security**. The Security page appears.
3. On the action bar, click **New Group**. The New Group screen appears.
4. Under **Group Privileges**, mark and select **Security by Constituency**. The **Options** button is enabled.

5. Click **Options**. The Security by Constituency screen appears.
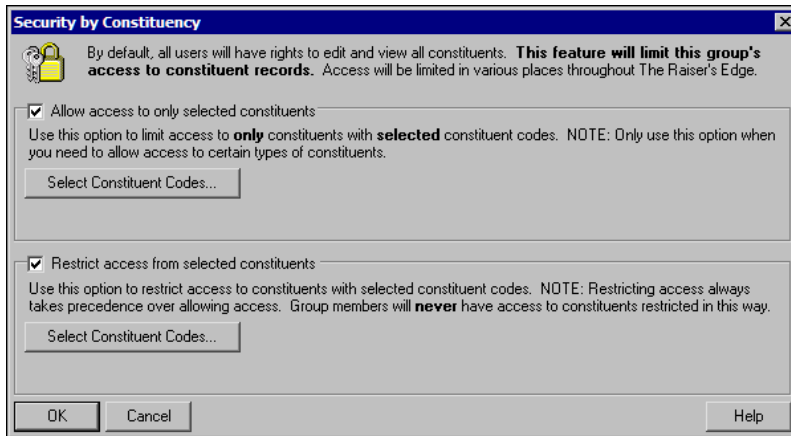
6. Under **Allow Access to Only Selected Constituent Codes**, establish the inclusion criteria.

   a. To limit access to only selected constituent codes, mark **Allow access to only selected constituent codes**. The **Select Constituent Codes** button is enabled.

   b. Click **Select Constituent Codes**. The Selected Constituent Codes screen appears. The grid lists all constituent codes currently in the program.
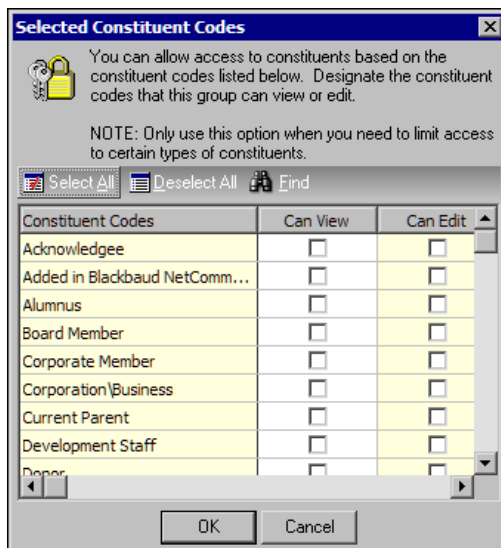
   c. In the grid, select the constituent codes the group can view or edit. For the group to access a constituent record, it must contain at least one of the selected codes. To mark all checkboxes, click **Select All**. To unmark all checkboxes, click **Deselect All**. To use the Find screen to search for a specific code, click **Find**.

   d. Click **OK**. You return to the Security by Constituency screen.

Note: Restricted access takes precedence over granted access. Group members cannot access constituents restricted through the **Restrict Access From Selected Constituent Codes** frame.

7. Under **Restrict Access From Selected Constituent Codes**, establish the exclusion criteria.

   a. To restrict user access to constituents with certain codes, mark **Restrict access from selected constituent codes**. The **Select Constituent Codes** button is enabled.

b. Click **Select Constituent Codes**. The Selected Constituent Codes screen appears. The grid lists all constituent codes currently in the program.
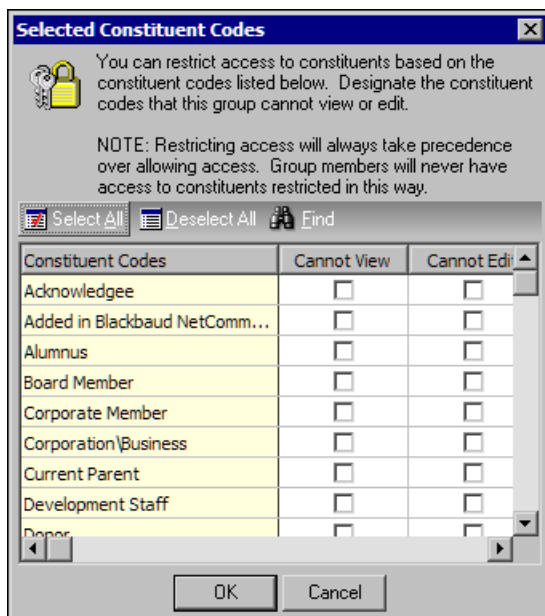
c. In the grid, select the constituent codes the group cannot view or edit. To mark all checkboxes, click **Select All**. To unmark all checkboxes, click **Deselect All**. To use the Find screen to search for a specific code, click **Find**.

d. Click **OK**. You return to the Security by Constituency screen.

8. To save your settings, click **OK**. You return to the New Group screen.

Security by Constituency Examples

Inclusion and exclusion security bases access to constituent records on whether the record contains one or multiple types of constituent code. Inclusion gives rights to a group for only the selected codes; exclusion denies rights for the selected codes.

For example, with the constituent code of Alumni, if no exclusion criteria exists for a security group, the users in that group can access all alumni, no matter which other constituent codes the record may have. If you then set an exclusion for Board Members, the users can access all alumni except those whose records are also coded as Board Members. With inclusion criteria, you can allow groups to access constituent records with only certain codes. If you specify the group can access only constituents coded as Alumni, users can access only those records that contain that constituent code. If the record contains other codes in addition to alumni, the user can still access the record unless you establish exclusion criteria. If you do not specify either inclusion or exclusion criteria, a user can access all constituent codes.

Inclusion

If you mark **Allow access to only selected constituents** and grant access to records with the code "Alumnus" with inclusion criteria, the user can access only records that contain that code. If a record has two or more codes, the user has access to it as long as one is "Alumnus." If a user has inclusion rights for "Alumnus" and opens a constituent record with "Alumnus", "Current Parent," and "Friend" in the **Constituent Codes** grid of the Bio 2 tab, in addition to being able to edit the "Alumnus" row, the user can also edit the rows that contain the "Current Parent" and "Friend" codes, as long as they are not limited through exclusion criteria. All defined codes list when the user clicks the down arrow in the **Code** table of the **Constituent Codes** grid. However, the user cannot save a record unless it contains the code "Alumnus".

You can use inclusion criteria to allow access to only records with certain codes but not exclude access to records with multiple codes. For example, a large organization with chapters in different states can add state abbreviations to its entries in the **Constituent Code** table (for example, a "Friend" in South Carolina can be coded "FRSC"). The organization can then use inclusion criteria to specify that each chapter can access only records from its own state. Some records may contain codes for multiple states (a constituent could be listed as a "Friend" in one state and a "Volunteer" in another). Both state chapters could access the record, but each chapter could access only those records from another state that also include the code for its own state. To prevent a group from viewing and editing records with certain constituent codes, you must use exclusion criteria.

Exclusion

If you limit view and edit rights to the constituent code "Trustee" for a group, users in the group cannot open or delete records that have the code "Trustee". A user cannot assign the code "Trustee" to a record. It does not appear in the list of entries for the **Constituent Code** table when a user clicks the down arrow. Records with the code "Trustee" do not appear in searches for the group. The user cannot manually add a solicitor, honor/memorial, matching gift company, or soft credit recipient with a code of "Trustee" to a gift record. However, any soft credit recipient or matching gift company designated to be automatically added is added even if they have the code "Trustee".

The user cannot open or edit gift records to a restricted constituent. However, the user can open and edit gift records with the code "Trustee" as long as the code appears only on the gift record, not the constituent record. The user can also open and edit gifts with a Trustee solicitor in the Solicitor grid, a Trustee honor/memorial on the Honor/Memorials tab, a Trustee matching gift company on the Matching Gifts tab, and a Trustee soft credit recipient on the Soft Credit tab. Reports and queries do not include gifts to Trustee constituents.

Want to know more about

Gift Security by Fund

You can limit the ability of a group to access gifts given to particular funds. Limiting access to gifts through this option affects reports, queries, and data entry. If a user belongs to multiple groups, and one group can access a certain fund, but another group cannot access that fund, the user cannot access the gift records for that fund.

Want to see some

▶ **Assign gift security by fund**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **Gift Security by Fund**. When you mark the checkbox, the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.
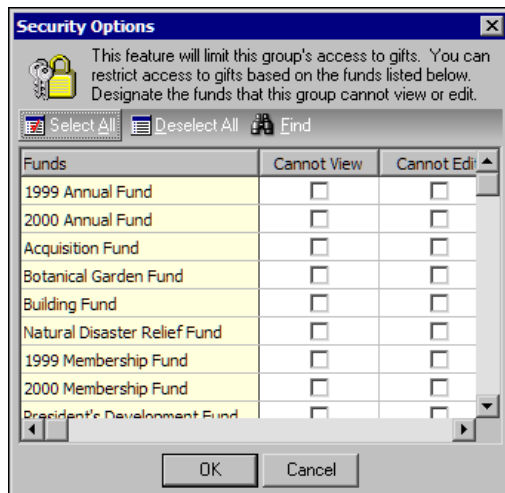
> **Note**: When you add a new fund, all groups are automatically given view and edit rights for gifts to that fund.

6. Select the funds the security group cannot view or edit. All funds, both active and inactive, appear in the grid and default to unmarked. If you mark **Cannot View**, the **Cannot Edit** checkbox is locked as marked since a group cannot edit gifts to a fund for which it does not have view rights.

7. To save your settings, click **OK**. You return to the New Group screen.

Gift Security by Fund Examples

To limit access to gifts for users, you can limit view and edit rights to funds. For example, your organization can have a Library Fund to target large gifts for which you do not want all your users to access. If you mark **Cannot View** in the **Library Fund** row on the Security Options screen for **Gift Security by Fund**, users cannot access any gift given to this fund. The user cannot open gifts to the Library Fund or assign the Library Fund to gifts. The Library Fund does not appear in fund searches or as a possible entry when the user clicks the down arrow in the **Fund** table field of the gift record. For all show modes except **By Fund**, gifts to the Library Fund do not appear on the Gifts tab of a constituent record. When a user selects **By Fund**, the unrestricted part of a gift lists for viewing only. Unrestricted parts can include matching gifts or soft credits to other funds. Any part of a split gift that is not restricted displays the true balance including the restricted amount.

Any constituent, campaign, fund, or appeal summary or gift list run by the user does not show gifts to the Library Fund. However, any part of a split gift that is not restricted appears in the report. Gifts associated with the Library fund, including split gifts, do not appear in search results.

Gift security by Fund takes precedence over any object level settings for records or reports, so if the group has full rights to gifts granted in records, they still cannot view gifts to the Library Fund. For campaigns and appeals with the Library Fund on the Funds tab, the Library Fund displays in the grid, but a user cannot add the Library Fund to the grid. If you have *Event Management* and the default fund for an event is the Library Fund, when a user adds a gift, the program processes the gift as if the **Default fund** field is blank. A "Required Field Missing" message appears, but the gift loads anyway.

Notepad Security by Type

You can define notepad types that a group cannot view or edit. This can be useful if you use notepads to retain sensitive information, which should not be available to everyone at your organization. For example, you may want to make a notepad type named "Director's Notes" accessible to only the Director and Assistant Director, so you can create a security group with only those two users as members and grant the group rights to this notepad type and restrict all other groups from this notepad type.

Want to see a "Notepad by Type Security Example" on page 218?

▶ **Assign notepad security by type**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, mark and select **Notepad Security by Notepad Type**. The **Options** button is enabled.

5. Click **Options**. The Security Options screen appears. The grid lists all notepad types.
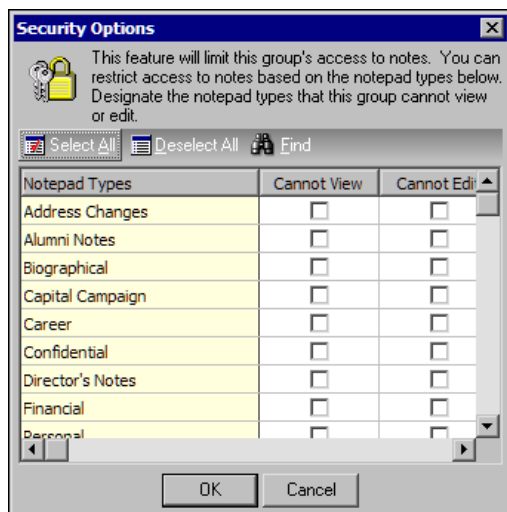
Note: If users are not allowed to view or edit a specific notepad type, they can still delete constituent records with the restricted notepad type through **Globally Delete Records** in *Administration* or through *Records*.

6. In the grid, select the notepad types the group cannot view or edit. All checkboxes default to unmarked, giving access to all notepad types to the group.

7. To save your settings, click **OK**. You return to the New Group screen.

Notepad by Type Security Example

You can use Notepad security to limit access to sensitive information in your notes. You can set up a notepad type of Confidential and limit security to only a few key users. Any user who does not have access cannot open or delete Confidential notepads, including constituent and, if you have *Event Management*, event notepads. The user cannot assign the Confidential type to notepads. When the user clicks the down arrow in the **Type** field of the New Notepad screen, Confidential does not appear in the list of possible entries. When the user runs a query, Confidential does not appear in the filter list or on the query itself. The user cannot export the Confidential notepad type and it does not appear in reports.

Want to know more about "Notepad Security by Type" on page 218?

Membership Scanning

Security for *Membership Scanning* is defined on only one level. If you mark **Membership Scanning** under **Group Privileges** on the New Group screen, the members of the group can access *Membership Scanning*.

Dashboard

You can assign security access to *Dashboard*. If you mark **Dashboard** in the **Group Privileges** box on the New Group screen, the members of the group can access *Dashboard*. When you assign security privileges for *Dashboard*, you can select whether to enable members to share dashboards. Other Security rights, such as record and system level settings affect which summaries are available and which records appear as results in *Dashboard* summaries.

▶ **Assign security privileges for Dashboard**

1. On the Raiser's Edge bar, click **Admin**. The Administration page appears.
2. Click **Security**. The Security page appears.
3. On the action bar, click **New Group**. The New Group screen appears.
4. Under **Group Privileges**, select **Dashboard**. When you mark the checkbox, the **Options** button is enabled.
5. To enable members in the group to share dashboards:

   a. Click **Options**. The Security Options screen appears.
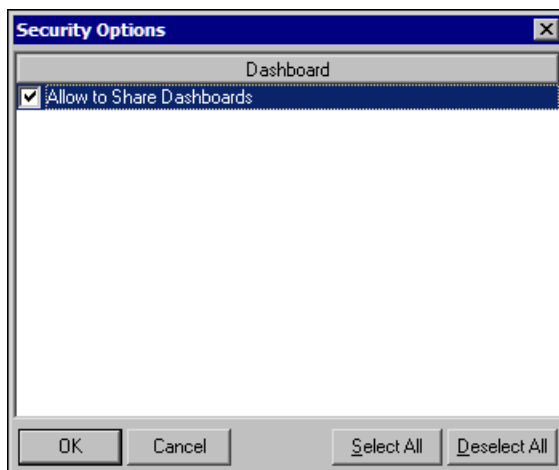
   b. Mark **Allow to Share Dashboards**.

   c. Click **OK**. The group security screen appears.

6. To save your settings, click **Save and Close**. You return to the Security page.

Install Samples

Security for installing the samples that come with *The Raiser's Edge* is defined on only one level. If you mark **Install Samples** under **Group Privileges** on the New Group screen, the members of the group can access the samples. Other Security rights, such as record and system level settings, affect which specific samples a user can view. For example, a user must have access to queries to view query samples. For more information about the types of samples that are included with *The Raiser's Edge* and how to install them, see the Program Basics chapter of the *Program Basics Guide*.

Want to see the other "Security Types" on page 178?

NetSolutions

You can assign security access to each area of *NetSolutions* so users can access some areas but not others. For example, you may want a security group to manage NetMail pages but not access Configure and Customize.

▶ **Assign security privileges for NetSolutions**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **NetSolutions**. When you mark the checkbox, the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.
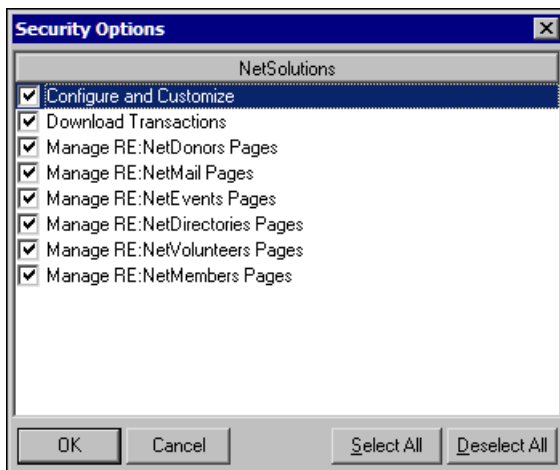
6. Select each area of *NetSolutions* the members of this group can access.

7. Click **OK**. You return to the group security screen.

8. To save your settings, click **Save and Close**. You return to the Security page.

Proposal Security by Purpose

You can limit the ability of a group to access proposals with specific purposes. For example, if you have several fundraisers in your organization, you may want to limit their ability to look at proposals by other fundraisers so one fundraiser cannot see what another is asking for.

Limiting access to proposals through this option affects reports, queries, and data entry. If a user belongs to multiple groups, and one group has access to a certain proposal, but another group does not, the user cannot access that proposal. Want to see a "Proposal Security by Purpose Example" on page 221?

▶ **Assign proposal security by purpose**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **Proposal Security by Purpose**. When you mark the checkbox, the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.
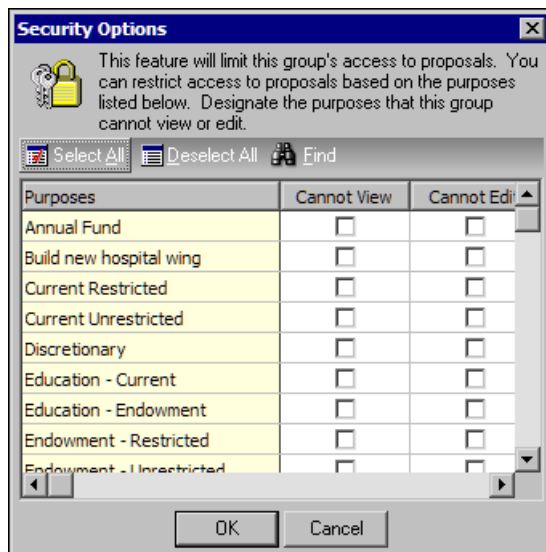
6. Select the proposal purpose types the group cannot view or edit. All purposes appear in the grid and default to unmarked. If you mark **Cannot View**, the **Cannot Edit** checkbox is locked as marked since a group cannot edit gifts to a fund for which it does not have view rights.

7. To save your settings, click **OK**. You return to the New Group screen.

Proposal Security by Purpose Example

Your organization may have a proposal type of "Major Gift" for those efforts that target large gifts. You may not want all users to access these proposals. If you mark **Cannot View** in the **Major Gift** row on the Security Options screen for **Proposal Security by Purpose**, users cannot access any proposal with this entry in the **Purpose** field. Users cannot open proposals with this purpose or assign this purpose to proposals. Major Gift proposals do not show in proposal searches.

Want to know more about "Proposal Security by Purpose" on page 220?

Data Health Center

Security for the *Data Health Center* is defined on only one level. If you mark **Data Health Center** under **Group Privileges** on the New Group screen, the members of the group can access the *Data Health Center*.

Want to see the other "Security Types" on page 178?

AMPro Integration

You can assign security access to several areas of the *AuctionMaestro Pro* integration so users can access some areas, but not others. For example, you may want a security group to download transactions but not configure the integration.

▶ **Assign security privileges for AuctionMaestro Pro integration**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **AMPro Integration**. When you mark the checkbox, the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears.
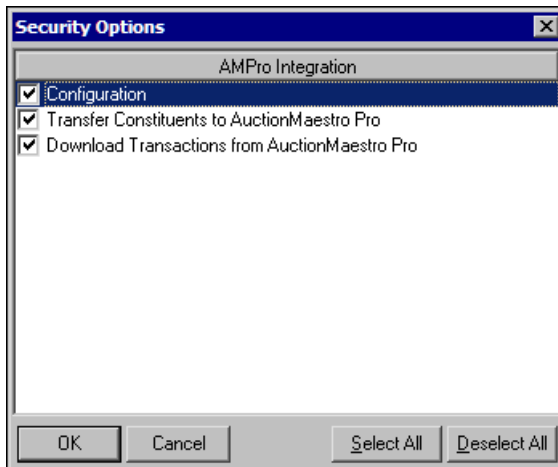
6. Select the areas of the *AuctionMaestro Pro* integration the members of this group can access.

7. Click **OK**. You return to the group security screen.

8. To save your settings, click **Save and Close**. You return to the Security page.

NetCommunity

When you integrate *The Raiser's Edge* with *Blackbaud NetCommunity*, you can assign security access to specific areas of the integration so users can access some areas but not others. For example, a security group may have access to the **NetCommunity** button on the Raiser's Edge bar but not to view user information from *Blackbaud NetCommunity* on constituent records. These security settings affect only the group's ability to access the *NetCommunity* integration functions. You also need the applicable rights in *The Raiser's Edge* for the functions you perform with information downloaded from *Blackbaud NetCommunity*. For example, to view information about *Blackbaud NetCommunity* site users on constituent records in *The Raiser's Edge*, the user must have security privileges in *Records*.

If, on the group screen, **NetCommunity** is marked under **Group Privileges**, the members of the group can access information downloaded from *Blackbaud NetCommunity*.

▶ **Assign security privileges for the Blackbaud NetCommunity integration**

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

2. Click **Security**. The Security page appears.

3. Under groups in the **Security** tree view list on the left, select the security group to assign access to *NetCommunity Integration*. For example, to assign the data entry personnel access to *NetCommunity Integration*, select **Data Entry**.

4. On the action bar, click **Open**. The group security screen appears.

5. Under **Group Privileges**, mark **NetCommunity**. When you mark this checkbox, the **Options** button is enabled.

6. Click **Options**. The Security Options screen appears.
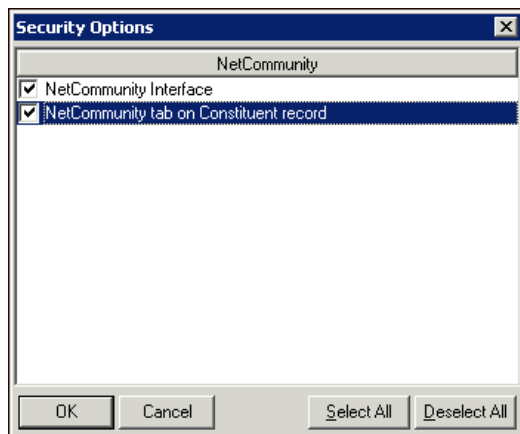
7. Select each area of *NetCommunity Integration* the members of the group can access,.

• To enable the group to click the **NetCommunity** button on the Raiser's Edge bar to access the NetCommunity page, mark **NetCommunity Interface**.

• To enable the group to access information about ***Blackbaud NetCommunity*** website users on the constituent records in ***The Raiser's Edge***, mark **NetCommunity tab on Constituent record**.

To mark both checkboxes, click **Select All**. To unmark both checkboxes, click **Deselect All**.

8. Click **OK**. You return to the group security screen.

9. Click **Save and Close**. You return to the Security page.

Action Security by Type

You can define action types that a group cannot view or edit. This can be useful if you use actions to retain sensitive information, which should not be available to everyone at your organization. For example, you may want to make an action type named "Director's Actions" accessible to only the Director and Assistant Director.You can create a security group with only those two users as members and grant the group rights to this action type and restrict all other groups from this action type.

▶ **Assign action security by type**

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

2. Click **Security**. The Security page appears.

3. On the action bar, click **New Group**. The New Group screen appears.

4. Under **Group Privileges**, select **Action Security by Type**. When you mark the checkbox, the **Options** button is enabled.

5. Click **Options**. The Security Options screen appears. The grid lists all active and inactive action types.
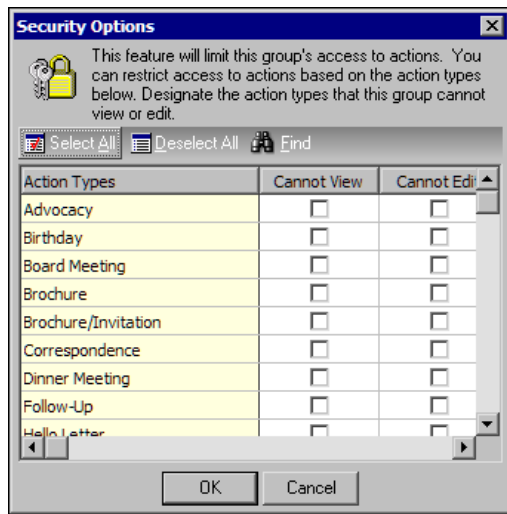
> **Note**: If users cannot view or edit a specific action type, they can still delete constituent records with the restricted action type through **Globally Delete Records** in *Administration* or through *Records*.

6. Select the action types the group cannot view or edit. All default to unmarked, giving access to all action types to the group.

7. To save your settings, click **OK**. You return to the New Group screen.

Action Type Security Example

You can use Action security to limit access to sensitive information in your actions. You can set up an action type of Confidential and limit security to only a few key users. Any user who does not have access cannot open or delete Confidential actions, including constituent and, if you use *Event Management*, event actions. The user cannot assign the Confidential type to actions. When the user clicks the down arrow in the **Action type** field on the New Action screen, Confidential does not appear in the list of possible entries. When the user runs a query, Confidential does not appear in the filter list or on the query itself. The user cannot export the Confidential action type and it does not appear in reports.

Want to know more about "Action Security by Type" on page 223?

MatchFinder

You can assign security access to several areas of the *MatchFinder* database so users can access some areas but not others. For example, a security group can update the *MatchFinder* database but not launch the Cross-Reference Tool. These security settings affect only your ability to access the *MatchFinder* functions. You also need the applicable rights in *The Raiser's Edge* for the functions you perform with the information from the *MatchFinder* database. For example, to link *MatchFinder* records to your records in *The Raiser's Edge*, you must have security privileges in *Records*.

If, on the group screen, **MatchFinder** is marked under **Group Privileges** box, the members of the group can access *MatchFinder*.

▶ **Assign security privileges for MatchFinder**

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

2. Click **Security**. The Security page appears.

3. Under groups in the **Security** tree view list on the left, select the security group to assign access to *MatchFinder*. For example, to assign the data entry personnel access to *MatchFinder*, select **Data Entry**.

4. On the action bar, click **Open**. The group security screen appears.

5. Under **Group Privileges**, mark **MatchFinder**. The **Options** button is enabled.

6. Click **Options**. The Security Options screen appears.
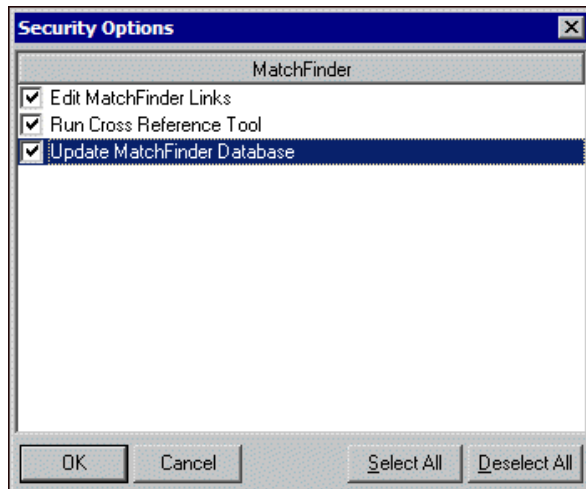
Warning: To run the cross-reference tool, the user must have rights to both **Edit MatchFinder Links** and **Run Cross-Reference Tool**.

7. Select each area of *MatchFinder* the group can access.

    • To allow members of the security group to create and break links between records in the *MatchFinder* database and the database in ***The Raisers' Edge***, mark **Edit MatchFinder Links**.

    • To allow members of the security group to use the cross-reference tool, mark **Run Cross-Reference Tool**. To run the cross-reference tool, the user must also have rights to **Edit MatchFinder Links**.

    • To allow members of the security group to run the process to update the *MatchFinder* database, mark **Update MatchFinder Database**.

    To mark all three checkboxes, click **Select All**. To unmark all three checkboxes, click **Deselect All**.

8. Click **OK**. You return to the group security screen.

9. Click **Save and Close**. You return to the Security page.

Want to know more about "Proposal Security by Purpose" on page 220?

Sphere

When you integrate ***The Raiser's Edge*** with Blackbaud ***Sphere***, you can assign security access to the integration on only one level. If you mark **Sphere** under **Group Privileges** on the New Group screen, the members of the group can use the **Sphere** button on the Raiser's Edge bar to access the information downloaded from ***Sphere***. For information about how to integrate ***The Raiser's Edge*** with ***Sphere***, see the *Blackbaud Sphere and The Raiser's Edge Integration Guide*.

Want to see the other "Security Types" on page 178?

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