

The Raiser's Edge™

7.95 New Features Guide

092415

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New Features and Enhancements



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The Raiser's Edge Enterprise 7.95 includes changes to addresses, phone numbers, and email addresses on constituent records, as well as a few enhancements to *Dashboard* and pivot reports. This chapter includes an overview of all the new features in *The Raiser's Edge*.

Essential Features for the Time-Sensitive User

We know your time is important, so below is a quick list of the essential features and recommended action to take on them. Feel free to use this as a fast look at things that should require your attention, and then revisit the rest of the guide for a more comprehensive look at everything in the **7.95** release.

Contact information marked inactive. In **7.95**, all contact information, such as phone numbers and email addresses, that was associated with an address other than the constituent's preferred, has been moved to the Bio 1 tab, and marked as inactive. Similarly, reciprocal relationship-specific contact information between two individual constituents is no longer supported in *The Raiser's Edge 7.95*. Any contact information between two constituents that was stored on reciprocal relationship records has been moved to the Bio 1 tab and marked as inactive. For more information, see "Phone and Email Data Considerations After Upgrading from 7.93 or Lower" on page 7.

Comments column - pre-populated for 7.93 or lower. The **Comments** column now appears in the contact information grid on constituent records. It provides a free-text field to enter additional information, such as, "Do not call after 6 p.m.," or to indicate if that information was moved to the constituent record from an alternate address. If you are upgrading from **7.93** or lower, the **Comments** column for each piece of contact information that came from an alternate address or reciprocal relationship will be pre-populated with that information.

Updates to Pivot Reports. Pivot reports are now generated in *Microsoft Excel*. Existing pivot reports will be maintained in *The Raiser's Edge 7.95*, but you will need to re-create each axis to get results to appear in *Excel*. To prepare for this change, we strongly recommend you take snapshots of your existing Pivot Report setups to use as a guide to recreate your new *Excel*-based reports. For more information, see <http://www.blackbaudknowhow.com/the-raisers-edge/raisers-edge-7-94-blog-series-dashboards-and-pivot-reports-changes.htm>.

Mark Phones Primary Plug-In. You can use the Mark Phones Primary plug-in to automatically mark or unmark all phone numbers of a specified phone type as Primary, based on a query. Since all phone information associated with alternate addresses is marked as inactive in **7.95**, you can also use this plug-in to mark those numbers as active again. For more information, see "Mark Phones Primary Plug-In" on page 9.

New Business Rule for phone and email types. To prevent duplicate phone and email types on constituent records, you can now set a business rule to prevent multiple phone numbers and email addresses of the same type to be saved. The phone and email options business rule is flexible so that you can set different rules for phone numbers and email addresses. For more information, see "Business Rules for Contact Information" on page 5.

Removal of contact information sharing. You can no longer have shared contact information between two constituents. When you upgrade to *The Raiser's Edge 7.95*, a copy of each piece of contact information is added to each record that was part of that previous sharing.

Why Did We Make Changes to Contact Info?

Since the original release of *The Raiser's Edge*, phone numbers, email addresses, and other contact information was required to exist as part of constituent's physical addresses. At the time, this made perfect sense, as landlines and business phone numbers were the primary source of contact, and your internet service provider gave you your email address.

Today, the landscape is quite different! Cell phones are most common, and cloud email services have replaced those provided by your ISP. When you move, those contact methods don't change, and that information should be associated with the constituent, and not their address.

So, you asked, and we listened! To keep up with the times, we have de-coupled phone numbers and email addresses from physical addresses in *The Raiser's Edge 7.95*, and moved that contact information to its own space on the constituent record! With 1,282 votes, this was one of the top software requests on our Idea Bank.

Constituent Records

Note: If you are upgrading from *The Raiser's Edge 7.94*, this functionality already exists.

Phone numbers and email addresses on the constituent record are no longer part of the address block. Phone numbers, email addresses, Web links, fax numbers, and any other contact numbers are now in a tabbed grid below the address block. The same grid appears on relationship records, participant records for events, and anywhere else address and phone information are stored.

The screenshot shows the constituent record for Mark D. Adamson. The interface includes a menu bar (File, Edit, View, Constituent, Letter, Favorites, Tools, Help) and a toolbar. Below the toolbar is a navigation bar with tabs for various record types: Media, Actions, Honor/Memorial, Volunteer, Prospect, Membership, Events, Bio 1 (selected), Bio 2, Addresses, Addressees/Salutations, Relationships, Appeals, Notes, Gifts, and Attributes. The main content area is divided into two columns. The left column contains biographical information: Last name (Adamson), First name (Mark), Middle name (Daniel), Titles (Mr.), Suffixes (. III), Nickname, Maiden name, ID (3), Gender (Male), SSN (269-53-1152), Birth date (09/23/1954), Age (60), Deceased? (checkbox), Marital status (Married), Spouse, and Solicit code (Do not phone at work). The right column contains address information: Preferred Address (Home), Country (United States), Address lines (125 Smokerise Way), City (Charleston), State (SC - South Carolina), ZIP (29401), and DPC. Below the address information is a tabbed grid for contact information. The tabs are Telephone Numbers (selected), Email Addresses, Links, and Fax Numbers. The grid contains the following data:

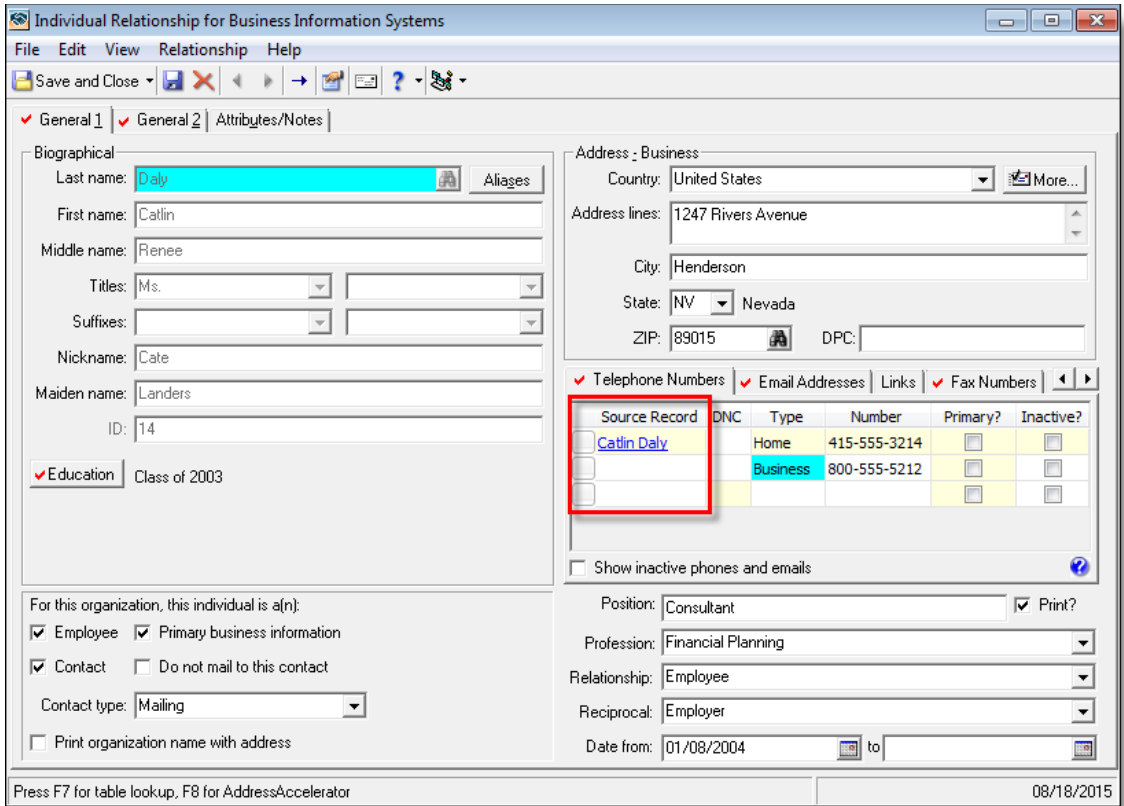
DNC	Type	Number	Primary?	Inactive?
<input type="checkbox"/>	Home	843-798-6698	<input checked="" type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Cell Phone	843-555-5555	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>

Below the grid is a checkbox for "Show inactive phones and emails". At the bottom of the form, there are checkboxes for "This constituent" status: Is inactive, Gives anonymously, Requests no email, Is a solicitor, and Has no valid addresses. At the very bottom, there are buttons for "Education", "Business" (selected), and "Bank", along with a "Source Record" column and a date "06/30/2015".

Source Record Column

The **Source Record** column now appears on relationship records for individual to organization relationships. This column helps you identify which information applies to the relationship, and which applies to the constituent. In the image below, you can see that the first row in the contact information grid displays Catlin's phone number from her Bio 1 tab, and the second row displays the phone number specific to her relationship with Business Information Systems.

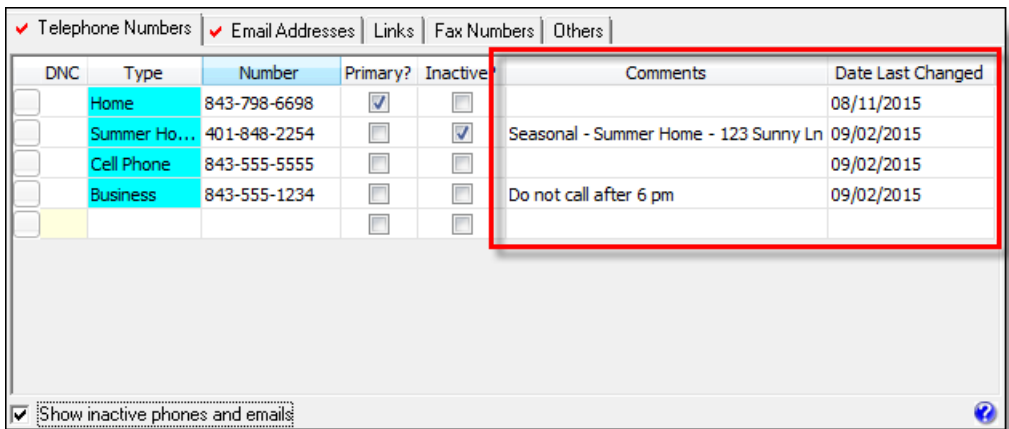
You can click Catlin’s name to display her constituent record.



Date Last Changed and Comments Columns

The **Date Last Changed** and **Comments** columns now appear on the contact information grid of constituent records. These fields serve as a reference to easily identify phone numbers, email addresses, and other information on records. The **Comments** column provides a free-text field to enter additional information, such as, “Do not call after 6 p.m.,” or to indicate if that information was moved to the constituent record from an alternate address.

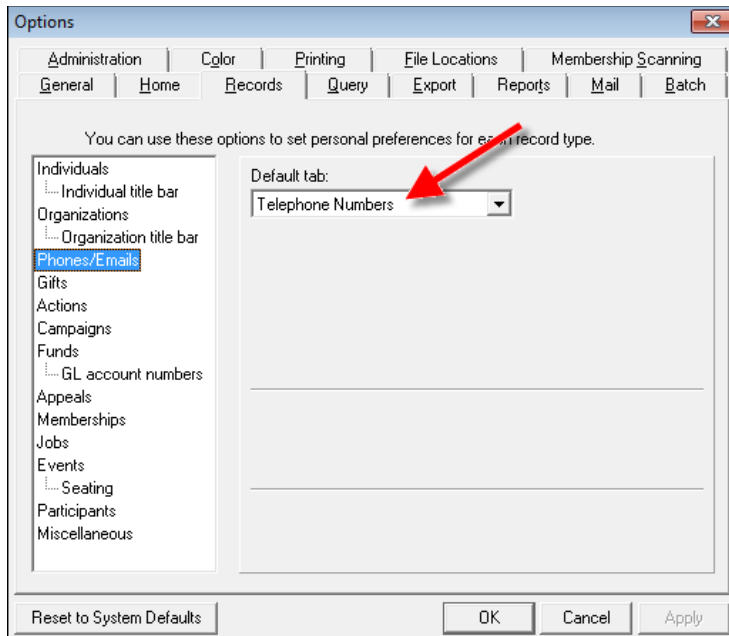
If you are upgrading from **7.93** or lower, the Comments column will be pre-populated with text to indicate where that contact information came from, such as a seasonal address.



User Options for Phones and Emails

You can now set a user option to determine which tab of the contact information grid is selected by default when you access a constituent record. This allows you to have the most relevant or most used information viewable when you access records.

To set the phones and emails user option, click **Tools** on the *The Raiser's Edge* bar, and select **User Options**. The Options screen appears. Select **Phones/Emails** on the Records tab. Under **Default tab**, select the contact information tab you would like displayed automatically when you open a constituent record.

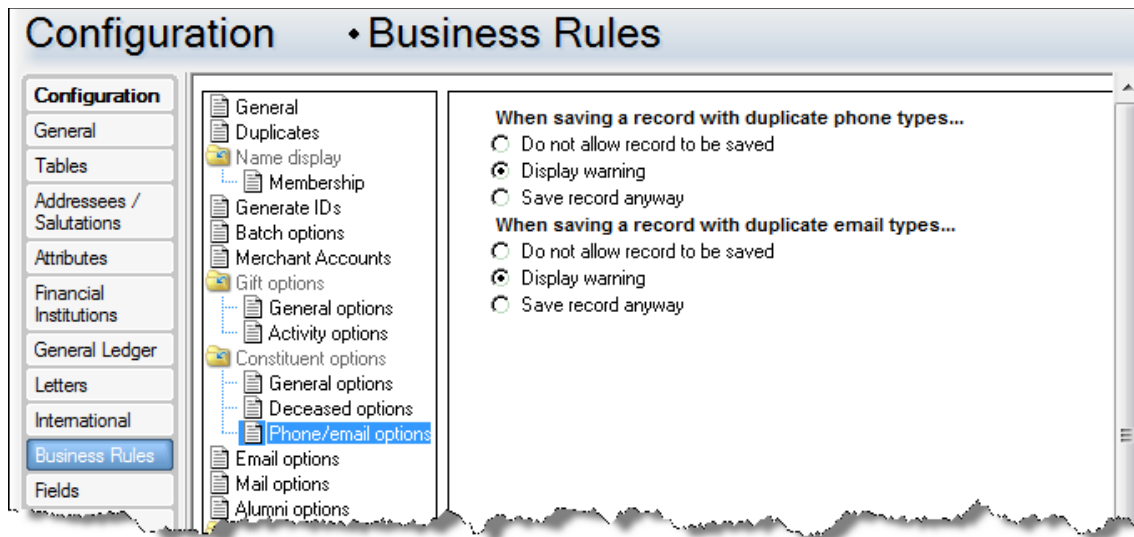


Business Rules for Contact Information

To prevent duplicate phone and email types on constituent records, you can now set a business rule to prevent multiple phone numbers and email addresses of the same type to be saved.

The phone and email options business rule is flexible so that you can set different rules for phone numbers and email addresses. You can also set the rule to allow duplicate types if you prefer, or display a warning each time a duplicate type is about to be saved.

To set the rule, go to **Business Rules** in **Configuration**. Under Constituent options, select **Phone/email options**.



Phone and Email Information in Relationships

With the way phone and email information is stored and shared in *The Raiser's Edge 7.95*, it is important to understand how this all works in constituent relationships.

▶ Individual to Individual Relationships

- You can only edit phone information from the constituent record, and not the relationship record. Changes will persist to the relationship record, but will appear in yellow to indicate they cannot be changed.
- You can, however, edit phone information from the relationship record for non-constituents, such as a spouse record. If you promote the non-constituent to a full constituent, the phone information becomes locked on the relationship record.
- When you add or edit a non-constituent's phone information, it will follow them to any new relationships that are created.
- These same rules apply to organization to organization constituent relationships.

▶ Individual to Organization Relationships

- From an individual's organization relationship record, you can add or edit phone information for the individual, such as to add an office phone number, but you cannot edit phone information for the organization.
- From an organization's individual relationship record, you cannot edit the individual's phone information.
- As a general rule, you can only change phone information from the source record. For example, if you added a phone number for an individual in this type of relationship, you can only edit that information from the individual's constituent record, and not the organization's record or the relationship record.

► Other Phone and Email Information

- Since you can no longer have relationship-specific phone information, all phone numbers listed on individual to individual relationships in *The Raiser's Edge 7.93* now appear on the Bio 1 tab of the main constituent's record. For example, if Mr. Smith has a spousal relationship with Mrs. Smith, and they had a relationship-specific phone number that was added from the Relationships tab of Mr. Smith's record, that phone number would appear on Mr. Smith's constituent record after the upgrade to *The Raiser's Edge 7.95*.

Phone and Email Data Considerations After Upgrading from 7.93 or Lower

Due to the removal of the concept of shared phone numbers and email addresses in *The Raiser's Edge*, you may find that your phone and email information appears differently than you would expect. For example, you may open an individual's relationship record with another individual, and notice multiple phone numbers with the same type. This is not an error, or representative of bad data. Rather, it is a result of the new rules that apply to phone and email sharing, as well as relationship functionality.

Reciprocal Relationship Contact Information Marked as Inactive on the Bio 1 Tab

In *The Raiser's Edge 7.95*, because we separated phones/emails from physical addresses to make it easier to contact your constituents, all this information surfaces on the Bio 1 tab. To keep consistency with how the Bio 1 tab looked in *7.93*, reciprocal relationship contact information is automatically marked as inactive.

Use the example below as a reference for this scenario.

In *The Raiser's Edge 7.93*, Angela Diresta has an individual constituent relationship with Joseph Diresta. Their relationship contains multiple relationship-specific phone numbers.

Individual Relationship for Angela Diresta

File Edit View Relationship Help

Save and Close

General 1 | General 2 | Attributes/Notes

Biographical

Last name: **Diresta** Aliases

First name: Joseph

Middle name: Patrick

Titles: Mr.

Suffixes: , Jr.

Nickname: Joe

Maiden name:

ID: 1

Business Education Class of 1999

Address : Home

Country: United States

Address lines: 248 Twin Lane
Building #3299

City: Birmingham

State: AL Alabama

ZIP: 35220 DPC:

Phones/Email/Links			
DNC	Type	Number/Email Address	Shared?
	Home	205-566-1254	Shared
	Business	205-568-1298	Shared
	Email	adresta@aol.net.com	Cannot be Shared
	Cell Phone	888-895-6321	Cannot be Shared

This individual is the:

Spouse

"Head of Household"

Relationship: Spouse

Reciprocal: Spouse

Date from: to

Since you can no longer have relationship-specific phone numbers in *The Raiser's Edge 7.95*, the phone numbers and email addresses from Angela's relationship record with Joseph are moved to the Bio 1 tab of Joseph's record, and marked as inactive.

Joseph P. Diresta

File Edit View Constituent Letter Favorites Tools Help

Save and Close

Media Actions Honor/Memorial Volunteer Prospect Membership Events

Bio 1 Bio 2 Addresses Addressees/Salutations Relationships Appeals Notes Gifts Attributes

Biographical

Last name: **Diresta** Aliases

First name: Joseph

Middle name: Patrick

Titles: Mr.

Suffixes: , Jr.

Nickname: Joe

Maiden name:

ID: 1

Gender: Male SSN: 394-78-5512

Birth date: 04/23/1965 Age: 50

Deceased? Date:

Marital status: Married

Spouse: Angela Diresta

Solicit code: One solicitation annually

Preferred Address: Home

Country: United States

Address lines: 248 Twin Lane Building #3299

City: Birmingham

State: AL Alabama

ZIP: 35220 DPC:

Telephone Numbers Email Addresses Links Fax Numbers

DNC	Type	Number	Primary?	Inactive?
<input type="checkbox"/>	Home	205-566-1254	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	Business	205-568-4200	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Business	205-568-1298	<input type="checkbox"/>	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	Cell Phone	888-239-5996	<input type="checkbox"/>	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Cell Phone	888-895-6321	<input type="checkbox"/>	<input checked="" type="checkbox"/>

Show inactive phones and emails

This constituent

Is inactive Is a solicitor Details

Gives anonymously Has no valid addresses

In the above screen shot, you see multiple Business phones and Cell Phones, but only when you select the **Show inactive phones and emails checkbox**. That is because one Business Phone and one Cell Phone were already on Joseph's record. The other two came from his relationship-specific phone numbers with Angela in *7.93*.

As a general rule, any relationship-specific phone numbers for individual to individual relationships in *7.93*, will be moved to the Bio 1 tab of the reciprocal constituent in *7.95*.

Inactive Contact Information

Note: If you are upgrading from *The Raiser's Edge 7.94*, this functionality already exists.

Any phone numbers and email addresses that were associated with an address that was marked as anything other than "Preferred" on the constituent record are now considered inactive. To display these phone numbers and email addresses, select **Show inactive phones and emails**.

Reciprocal relationship-specific contact information between two constituents is no longer supported in *The Raiser's Edge 7.95*. Any contact information between two constituents that was stored on reciprocal relationship records has been moved to the Bio 1 tab and marked as inactive. This allows you to keep your information, and allows your constituent records to appear as they did in *7.93*.

Note: During this move, any phone numbers and email addresses that have the same phone or email type, and the same phone number and email address, are removed to alleviate duplicate inactive information. The same applies to any relationship-specific phone numbers or email addresses in individual to individual relationships; when that information is moved to the Bio 1 tab of the appropriate constituent, duplicates are removed.

Mark Phones Primary Plug-In

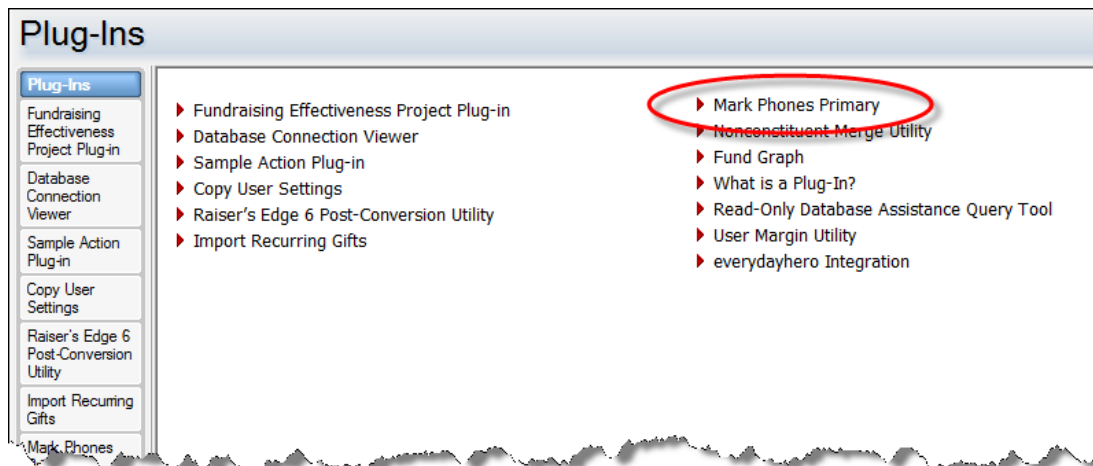
You can use the Mark Phones Primary plug-in to automatically mark or unmark all phone numbers of a specified phone type as Primary, based on a query.

Since all phone information associated with alternate addresses is marked as inactive in **7.95**, you can also use this plug-in to mark those numbers as active again.

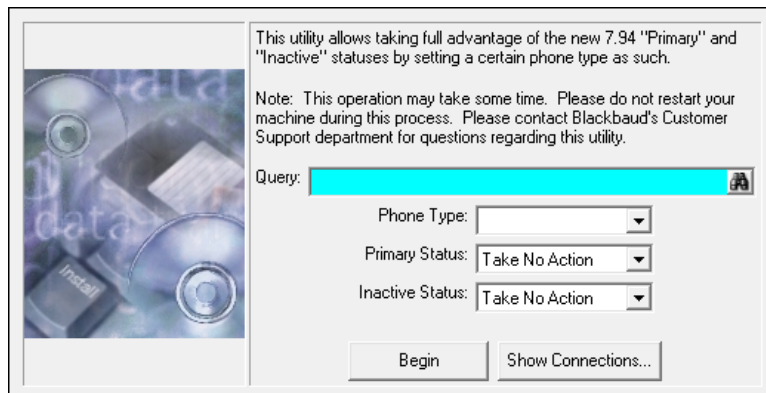
The Mark Phones Primary plug-in is automatically installed when you update to **The Raiser's Edge 7.95**.

▶ Mark phone types as Primary

1. Click *Plug-Ins* on **The Raiser's Edge** bar. The Plug-Ins page appears.



2. On the Plug-Ins page, click **Mark Phones Primary**. The Mark Phones Primary plug-in screen appears.

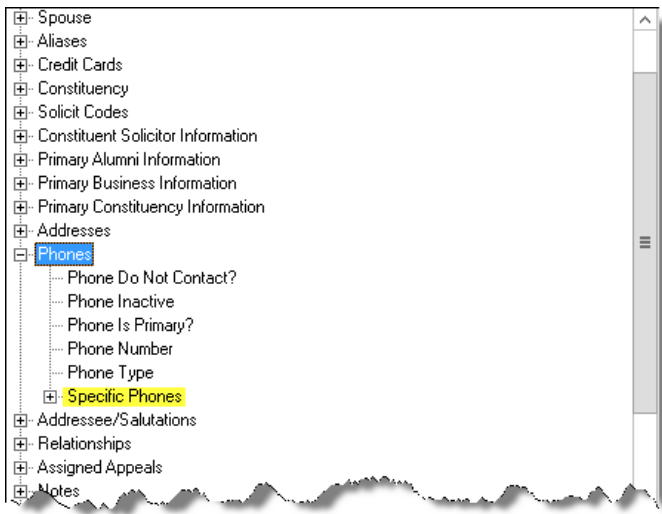


3. In the **Query** field, click the binoculars to search for and select a query of constituents to edit.
4. Select a phone type to edit.
5. In the **Primary Status** field, select whether to mark the selected phone types as Primary, unmark them as Primary, or elect to take no action on the primary status.
6. In the **Inactive Status** field, select whether to mark selected phone types as inactive, to reactivate them, or to take no action on the inactive status.
7. Click **Begin**. The process may take some time to complete, but when it does, all phone information for the specified phone type will be edited accordingly.

Query and Export

As a result of the phone number and email address changes on the constituent record, all existing queries with phone fields will still return active phone numbers in the results. However, if there were phone numbers or email addresses that were associated with an address other than the preferred address, they are now considered inactive. If there are any inactive phone numbers or email addresses you would like to appear in your results, we recommend you move that information to be associated with the constituent's preferred address.

When you create your queries and exports, phone numbers are now nested under their own **Phones** node. Email addresses, Web links, fax numbers, and any other contact numbers are under the **Specific Phones** node.



Import

Existing “Constituent Phone” imports have been renamed to “Constituent Phone Legacy.” You can still run them, but you cannot create new “Constituent Phone Legacy” imports. Instead, a new “Constituent Phone” import is now available. The new import does not require address phone import ID, and the **Phone is primary?** and **Phone inactive** fields have been added to all applicable import types.

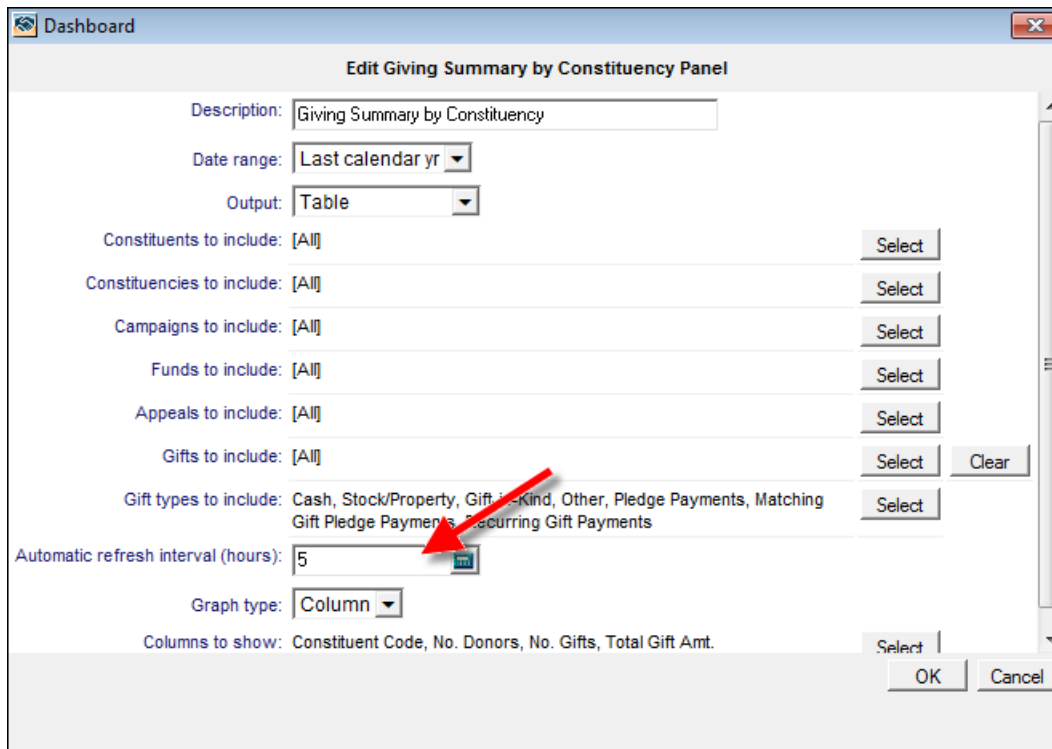
Custom Reports

Due to the phone number and email addresses change on the constituent record, any phone numbers and email address that are associated with alternate addresses will no longer appear when you run your reports. To get those phone numbers and email addresses to appear, you will have to edit your report to include inactive fields, or associate those phone numbers and email addresses with the constituent's preferred address.

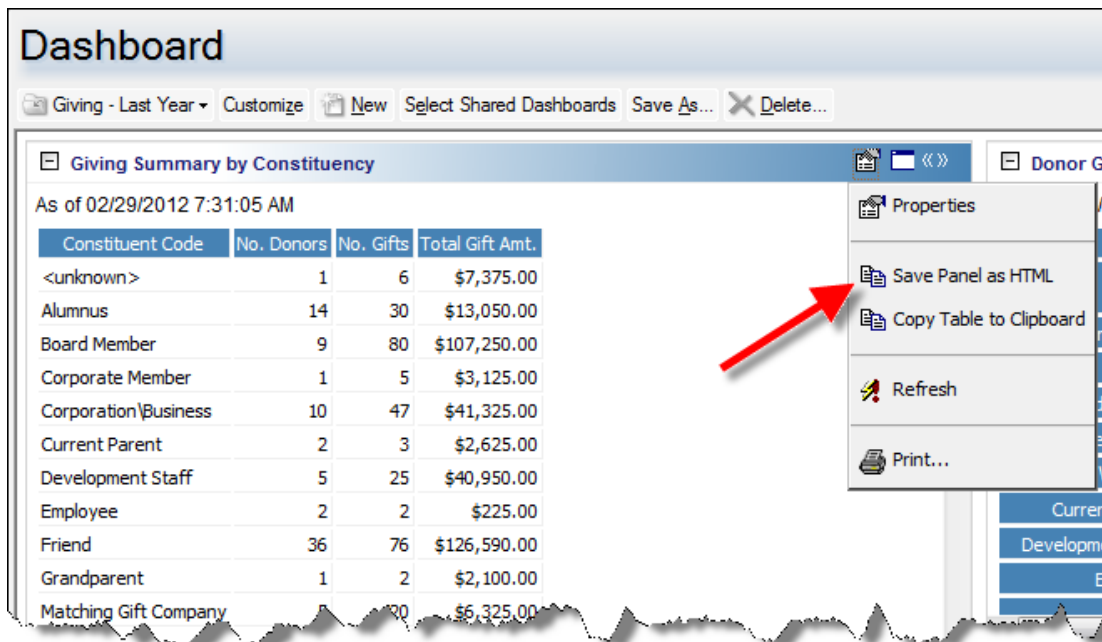
Dashboard

To use *Dashboard*, you no longer need to have *Microsoft Office Web Components* installed.

There is now an automatic refresh setting for *Dashboard* panels. Every time the *Dashboard* module is opened in *The Raiser's Edge*, each panel that is ready to be refreshed, based on the automatic refresh time intervals you set, will reload with up-to-date data.



In *Dashboard*, you no longer have the option to send a panel as an email or copy the graph to your clipboard. Instead, you can now save the panel as an HTML file. After you save a panel as an HTML file, you can then attach it to an email as you would any other file attachment.



Pivot Reports

Pivot reports are now generated in *Microsoft Excel*.

Existing pivot reports will be maintained in ***The Raiser's Edge 7.95***, but you will need to re-create each axis to get results to appear in *Excel*. In *Excel*, the pivot report will be divide into three sheets: the PivotChart, the data pulled from the query you selected to use to create the pivot report, and the pivot report itself.

Compatibility

To view the latest system requirements and compatibility for ***The Raiser's Edge***, see the system requirements document located on the Support page of Blackbaud.com.