

Which Guides Should I Read?

Many user guides accompany *The Raiser's Edge*. The chart below helps you decide which user guides to read, based on your job requirements, necessary tasks, and areas of *The Raiser's Edge* used most often. For a description of the information included in each guide, see the section below the chart.

We recommend accessing all guides from the website, as they are updated regularly. You can print all or selected pages to keep at your desk for reference. Some guides are written specifically for certain modules.

IF YOU WORK WITH:	WE SUGGEST YOU READ:
Alumni	Alumni Data Entry Guide, Constituent Data Entry Guide
Appeal planning	Campaigns, Funds, & Appeals Data Entry Guide; Mail Guide
Auctions	AuctionMaestro Pro Integration Guide, Event Management Data Entry Guide
Campaign planning	Campaigns, Funds, & Appeals Data Entry Guide; Prospect Data Entry Guide; Event Management Data Entry Guide; Mail Guide; Mapping Guide
Converting from <i>GiftMaker Pro</i> to <i>The Raiser's Edge</i>	GiftMaker Pro Pre-Conversion Planning Guide; GiftMaker Pro Conversion Guide
Converting from <i>The Raiser's Edge</i> 6.x to 7.x	Conversion Planning Guide, Conversion Guide
Database administration	Installation Guide; Program Basics Guide; Configuration & Security Guide; Database Administration Guide; Import Guide; Conversion Guide; Global Add, Delete, & Change Guide; Regular Supporters Implementation Guide; AuctionMaestro Pro Integration Guide; GiftMaker Pro Pre-Conversion Planning Guide; GiftMaker Pro Conversion Guide
Development Directors, Executives, or need high-level overview of program	Dashboard Guide, Sample Reports Guide, Planned Gift Tracking Guide, Mapping Guide, Custom View Guide
Donor biographical data entry	Constituent Data Entry Guide; Batch Guide; Program Basics Guide; Custom View Guide; Global Add, Delete, & Change Guide, Data Health Center Guide
Events	Event Management Data Entry Guide; Volunteers & Jobs Data Entry Guide; Mail Guide; Event Gifts Guide; Global Add, Delete, & Change Guide; AuctionMaestro Pro Integration Guide
Exporting data	Query & Export Guide, Queue for Task Scheduling Guide, Regular Supporters Implementation Guide
Extracting or analyzing information from the database, Solicitations, Prospect Management	Query & Export Guide, Dashboard Guide, Reports Guide, Summaries Guide, Blackbaud Analytics Guide, Constituent Data Entry Guide, Prospect Data Entry Guide, Queue for Task Scheduling Guide, Custom View Guide, Regular Supporters Implementation Guide, Mapping Guide



To find out about changes and new features, you should read the Release Notes included with each *Raiser's Edge* update. Release Notes appear in *The Raiser's Edge* when you first update or on the desktop of your computer once you install the latest version.


IF YOU WORK WITH:	WE SUGGEST YOU READ:
Fund planning	Campaigns, Funds, & Appeals Data Entry Guide; Constituent Data Entry Guide; AuctionMaestro Pro Integration Guide; Gift Records Guide; Dashboard Guide; CounterPoint SQL Integration Guide
Gift entry	Gift Records Guide; Batch Guide; MatchFinder Guide; Electronic Funds Transfer (EFT) Guide; Event Gifts Guide; Membership Gifts Guide; Tribute Gifts Guide; Proposal Gifts Guide; Regular Supporters Implementation Guide; Planned Gift Tracking Guide; CounterPoint SQL Integration Guide; Global Add, Delete, & Change Guide; AuctionMaestro Pro Integration Guide; Workplace Giving Guide
Importing data	Import Guide, Import Tutorial, Queue for Task Scheduling Guide, Regular Supporters Implementation Guide
Installing <i>RE:Anywhere for Remote Access</i>	RE:Anywhere for Remote Access Installation Guide
Installing <i>The Raiser's Edge</i> with <i>Oracle</i> or maintaining an <i>Oracle</i> database	Oracle Installation & Administrator's Guide
IT & Security	Installation Guide, Configuration & Security Guide, Conversion Planning Guide, Conversion Guide, Database Administration Guide
Mail merging, Creating custom forms	The Raiser's Edge & Microsoft Office Integration Guide, Mail Guide
Mailings	Mail Guide, Data Health Center Guide, Queue for Task Scheduling Guide, The Raiser's Edge & Microsoft Office Integration Guide, Regular Supporters Implementation Guide
Mailing donors letters	Mail Guide, The Raiser's Edge & Microsoft Office Integration Guide
Marketing & Communications	Mail Guide, Constituent Data Entry Guide, Reports Guide, Summaries Guide, Mapping Guide
Membership	Membership Data Entry Guide; Membership Scanning Guide; Mail Guide, Membership Gifts Guide; CounterPoint SQL Integration Guide; Global Add, Delete, & Change Guide
Membership card scanning	Membership Scanning Guide, Membership Data Entry Guide
Online campaigns, donations, marketing, events, website	NetSolutions Guide
Phonathons	Mail Guide, Batch Guide
Planned Giving Directors	Planned Gift Tracking Guide

IF YOU WORK WITH:	WE SUGGEST YOU READ:
Posting to <i>General Ledger</i>	Gift Records Guide, The Raiser's Edge and The Financial Edge: An Integrated Solution for Nonprofits
Receipting	Mail Guide
Reporting	Reports Guide, Sample Reports Guide, Summaries Guide, Queue for Task Scheduling Guide, Creating Custom Crystal Reports Tutorial, Dashboard Guide, The Raiser's Edge & Microsoft Office Integration Guide, Regular Supporters Implementation Guide, Workplace Giving Guide
Tributes & Honor/Memorials	Tribute Data Entry Guide, Tribute Gifts Guide, Constituent Data Entry Guide
Volunteers	Volunteers & Jobs Data Entry Guide; Global Add, Delete, & Change Guide; Event Management Data Entry Guide
Writing code to customize <i>The Raiser's Edge</i>	API Essentials Guide, VBA Essentials Guide

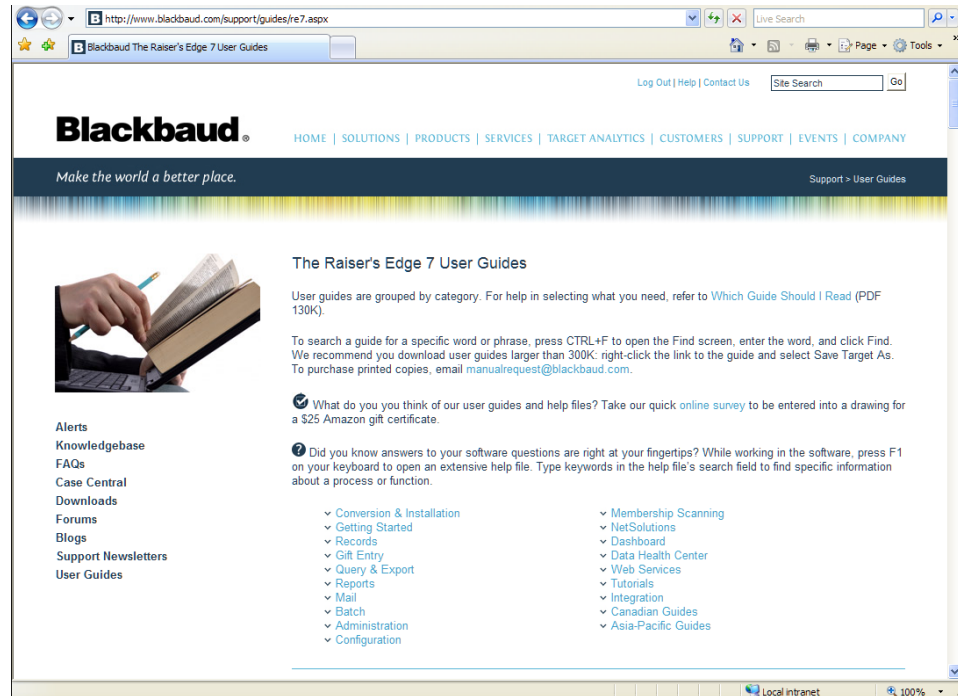
When you integrate *The Raiser's Edge* with any of our other programs, you can use these guides: *The Raiser's Edge and The Financial Edge: An Integrated Solution for Nonprofits*, *The Raiser's Edge and The Education Edge Integration Planning Guide*, *The Raiser's Edge and The Education Edge Integration Guide*, and the *Blackbaud NetCommunity Integration Guide*.


What Is In Each Guide?

To access all up-to-date guides, select **Support, User Guides** from the menu bar of the Blackbaud website and click the link for **The Raiser's Edge 7**. You can also access the guides from within the program by selecting **Help, User Guides** from the menu bar or from the Raiser's Edge bar.

 We recommend you access all guides from the website, as they are updated constantly. You can print all or selected pages to keep at your desk for reference. Some guides are written for modules. Before you purchase a guide, make sure you have the module.

The user guides are grouped under headings by topic, such as **Conversion & Installation**, **Getting Started**, **Records**, and **Gift Entry**. Click the name of the heading to see all user guides listed under it. To open a guide, click a user guide title.



 Have suggestions for the guides? Send an email to documentationcomments@blackbaud.com.

The guides available for *The Raiser's Edge* include:

Conversion Planning Guide. This guide helps you plan your conversion to *The Raiser's Edge* and introduces you to critical components of the conversion process.

Conversion Guide. This guide provides instructions for upgrading from previous versions of *The Raiser's Edge*. This book shows steps you can take prior to the conversion to help it go smoothly. It includes recommendations for cleaning up your database and spot checking records after conversion.

GiftMaker Pro Pre-Conversion Planning Guide. This guide helps you plan your conversion from *GiftMaker Pro* to *The Raiser's Edge*. It also introduces you to critical components of the conversion process.

Installation Guide. This guide shows how to install *The Raiser's Edge* on your computer or network. This book contains preinstallation considerations, installation instructions, and troubleshooting information.

Oracle Installation & Administrator's Guide. This guide contains detailed instructions for installing *The Raiser's Edge* for use with an *Oracle* database.

Update Guide. This guide contains instructions on how to update *The Raiser's Edge* to the most current version as well as information about the new features available. This guide is updated every release and should be read by every user.

RE:Anywhere for Remote Access Installation Guide. This guide contains instructions for installing the Web-based version of *The Raiser's Edge, RE:Anywhere for Remote Access*. This book contains preinstallation considerations, installation instructions, and security and troubleshooting information.

Web Services Installation and Setup Guide. This guide includes instructions about how to install and set up the various Web Services available in *The Raiser's Edge*. It also includes information about running Web Services and tracking your account status.

GiftMaker Pro Conversion Guide. This guide provides instructions for converting from *GiftMaker Pro* to *The Raiser's Edge*. It provides the steps necessary to prepare your *GiftMaker Pro* databases for the conversion and recommendations for cleaning up your database in *The Raiser's Edge* afterward. It also provides a field map explaining where your *GiftMaker Pro* data appears in *The Raiser's Edge*.

Program Basics Guide. This guide includes information about basic navigation and procedures and how to set up user options. Information is also provided to help you write a *Data Entry Protocol Guide* for your organization, which helps maintain data consistency.

Database Administration Guide. This guide contains information about how to set up and maintain your database using the utilities available in the Blackbaud Management Console.

Regular Supporters Implementation Guide. This guide shows how to manage aspects of your regular supporter programs. The guide directs you to tools that help you maintain recurring gifts, accept electronic donations, keep donors committed, attract new donors, increase donation amounts, and communicate effectively about where your donors' money is going. You also learn about reports that analyze how your programs are doing, how many donors you have lost, how many have upgraded donations, and who you should target next.

The Raiser's Edge & Microsoft Office Integration Guide. This guide provides information about integrating *The Financial Edge* with *The Raiser's Edge*. It includes procedures for configuring the systems for posting and running the Accountability Summary.

The Raiser's Edge and The Financial Edge: An Integrated Solution for Nonprofits. This guide provides information about integrating *The Raiser's Edge* with *The Financial Edge*. It includes procedures for configuring the systems for posting and running the Accountability Summary.

The Raiser's Edge and The Education Edge Integration Planning Guide. This guide includes a checklist to walk you through the integration between *The Raiser's Edge* and *The Education Edge*.

Blackbaud NetCommunity Integration Guide. This guide shows how to manage and view information about your constituents' activity on your organization's website when you integrate *The Raiser's Edge* and *Blackbaud NetCommunity*. The guide also provides instructions on how to view additional information from *Blackbaud NetCommunity* and how to create an Online vs. Offline Giving report to compare gifts you receive on your website to those received through other means.

AuctionMaestro Pro Integration Guide. This guide contains information about integrating *The Raiser's Edge* with MaestroSoft *AuctionMaestro Pro*. With the integration, you can easily transfer data between the two programs to simplify your auction event data entry and management. This guide also provides a field map explaining where your downloaded *AuctionMaestro Pro* data appears in *The Raiser's Edge*.

CounterPoint SQL Integration Guide. This guide provides instructions on how to integrate and use *CounterPoint SQL* from within *The Raiser's Edge*. You learn how to transfer constituents and memberships to *CounterPoint SQL* from *The Raiser's Edge* and learn how to download new donations, constituents, and amendments to memberships.

Mapping Guide. This guide includes instructions and explanations about the mapping features available in *The Raiser's Edge*. The guide explains the Mapping page, the Map screen accessed from *The Raiser's Edge*, how to create maps, and much more.

MatchFinder Guide. This guide provides information about how to use the *MatchFinder* database, which contains data about matching gift companies. Learn how to access *MatchFinder* information from within *The Raiser's Edge* and how to cross-reference records between the two databases.

Point of Sale Guide. This guide provides details about using Blackbaud's *Point of Sale* to exchange information between Sales Management System's *QuickSell Commerce* and *The Raiser's Edge*. *QuickSell Commerce* provides flexibility for configuring point of sale systems and supports multiple point of sale devices, such as scanners and printers, connected to your computer.

VBA Essentials Guide. This guide provides detailed instructions about how to use the *VBA for Advanced Customization* module to customize *The Raiser's Edge* for your organization's policies and procedures. Using *VBA*, a program developer can create custom business rules, design custom screens, create website interfaces, and much more.

API Essentials Guide. This guide provides detailed instructions about how to use the *API for Advanced Application Development* module to customize programs that integrate with your *Raiser's Edge* database.

Alumni Data Entry Guide. This guide provides step-by-step instructions for accessing, adding, and working with alumni and their relationships.

Campaigns, Funds, & Appeals Data Entry Guide. This guide shows how to set up these records and how they interact with each other. You can create campaigns to establish your overall objectives for raising money, funds to show the specific purposes for the money you raise, and appeals as the promotions and solicitations that bring in gifts. Also, learn how to use Campaign Giving Hierarchy to track and report on all aspects of your fund activity under the larger umbrella of campaigns.

Constituent Data Entry Guide. This guide teaches you how to properly set up constituent records in your database. You learn how to manage biographical information, addresses, addressees and salutations, relationships, attributes, notes, media items, and appeals. You learn how to create a letter, set up a relationship tree, add a constituent annotation, merge constituent records, and convert an individual record to an organization and vice versa. You also learn how to set up action records, assign solicitors, and set up solicitor teams.

Event Management Data Entry Guide. This guide helps you manage all aspects of your organization's events. You learn how to set up an event record, which encompasses the General, Prices, Expenses, Jobs, Actions, Attributes, Media, and Notes tabs of the event record. You also learn how to add participants to an event by using the Participants tab.

Membership Data Entry Guide. This guide includes detailed procedures on how to add, edit, and delete membership records. For example, you can learn how to add a gift of membership and rejoin a membership.

Prospect Data Entry Guide. This guide includes detailed instructions for managing all types of prospect information — tracking gifts made by prospective donors to other organizations; financial information, such as sources of wealth, annual income, and real estate holdings of prospective donors; and how your organization can create proposals, documenting amounts solicited, amounts funded, and ratings data.

Tribute Data Entry Guide. This guide helps you use Honor/Memorial Tracking to effectively manage your honor/memorial records. It provides instructions to add and edit tributes and view gifts given to a tribute.

Volunteers & Jobs Data Entry Guide. This guide teaches you how to track all aspects of your volunteers. You learn how to track volunteer information on the Volunteer tab of a constituent record. Information includes volunteer types and statuses, emergency contact information, volunteer qualifications, medical information, special needs and availability, checklists of tasks a volunteer must complete before starting a job, award information, and how to assign volunteers to job records in your database. You also learn how to set up job records.

Workplace Giving Guide. This guide includes detailed information about entering United Way agencies, accounts, pledge envelopes, pledge cards, and payouts in *The Raiser's Edge*. It also includes information about running Workplace Giving reports and batches. Sample reports are included.

Gift Records Guide. This guide contains information and explanations for all procedures related to adding, editing, and deleting gift records. For example, you can learn how to reschedule a pledge and add a matching gift. In addition, you can learn about posting to *General Ledger* and globally writing off pledges.

Event Gifts Guide. This guide contains information and explanations for all procedures related to adding and editing event gift records. For example, you can learn how to link a gift record to an event as an additional donation and learn how to pay an existing sponsoring pledge from a gift batch.

Electronic Funds Transfer (EFT) Guide. This guide provides instructions for automatically generating and processing direct debit and credit card transactions using an electronic funds transfer.

Membership Gifts Guide. This guide contains information and explanations for all procedures related to adding and editing membership gift records. For example, you can learn how to apply a pledge payment toward an existing membership and learn how to apply a recurring gift transaction to an existing membership.

Planned Gift Tracking Guide. This guide contains information about how to create gift records for your organization's planned giving, including information specific to planned gift vehicle types. You can record the initial gift value and the gift's remainder value, store payout information for applicable gift vehicles, and track beneficiaries and relationships for a planned gift.

Proposal Gifts Guide. This guide contains information and explanations for all procedures related to adding and editing proposal gift records. For example, you learn how to link a gift to a proposal record for another constituent and how to break the link between a gift record and a proposal.

Tribute Gifts Guide. This guide contains information and explanations for all procedures related to adding and editing tribute gift records. For example, you can learn how to add a tribute gift in a gift batch and edit tribute information entered on a gift record.

Query & Export Guide. This guide contains information about exporting data to other software programs and extracting information from *The Raiser's Edge*.

Reports Guide. *The Raiser's Edge* provides a wide variety of reports to help analyze aspects of your fundraising efforts. This guide includes explanations of each item on the report parameter tabs, as well as a section covering basic report procedures, and a tutorial for creating a report.

Sample Reports Guide. This guide includes descriptions and samples of each report available in *The Raiser's Edge*. The book also includes parameter tab settings used to generate each sample report. This guide is arranged by chapters based on various report categories available in the program.

Summaries Guide. This guide provides instructions for creating summaries to track the performance of your organization's solicitors, campaigns, funds, and appeals and to view a constituent's giving history.

Mail Guide. This guide contains instructions for all mailing tasks, including producing index cards, receipts, reminders, appeal cards, acknowledgement letters, labels, and envelopes.

Batch Guide. This guide provides detailed information about entering multiple constituents, gifts, or timesheets into your database at once. Using *Batch* can greatly speed up your data entry.

Import Guide. This guide provides instructions for importing data into *The Raiser's Edge* from various sources, including other fundraising software. This guide is helpful to anyone who uses the program but is ideally suited for a user who is very familiar with *The Raiser's Edge*.

Global Add, Delete, & Change Guide. This guide contains steps for saving time by performing functions globally in *The Raiser's Edge*.

Queue for Task Scheduling Guide. This guide includes instructions on how to set up a series of tasks to run automatically and unattended. It explains how to schedule queues to export, print, or run information when all your volunteers and employees have left for the day.

Blackbaud Analytics Guide. This guide contains instructions for using the *Blackbaud Analytics* service.

Configuration & Security Guide. This guide explains how to configure *The Raiser's Edge* and set up security.

Custom View Guide. This guide provides information about creating custom views of constituent records in your database. By creating custom views, you can select to see only what is important to you. You can easily select and organize the fields to appear on a constituent record.

Membership Scanning Guide. This guide provides instructions for scanning barcodes to retrieve membership information from your *Raiser's Edge* database. You can also change a membership status, such as upgrading or renewing a membership.

NetSolutions Guide. This guide provides instructions for how to set up and use this powerful tool to capture donations, and manage events and appeals on the World Wide Web.

Dashboard Guide. This guide contains instructions on how to take a "snapshot" of your fundraising success at any given time. *Dashboard* is ideal for development directors, executives, or users who need to quickly access data. Because *Dashboard* does not require a complete working knowledge of *The Raiser's Edge*, it is convenient for infrequent users.

Data Health Center Guide. This guide includes detailed instructions about working with **AddressFinder**, **DeceasedRecordFinder**, **EmailFinder**, **PhoneFinder**, and **AddressAccelerator**. The guide also explains how to submit your data to Blackbaud for a free checkup.

Creating Custom Crystal Reports Tutorial. This tutorial takes you step-by-step through the basics of planning and creating a custom *Crystal* report. It also walks you through the steps of creating two of the most common custom reports: a phone list and a gift detail report.

Import Tutorial. This tutorial shows you how to create a gift and constituent import file, change files in a Microsoft *Excel* spreadsheet, and import the updated information back into *The Raiser's Edge*. You also learn how to create an import file in *Excel* and then import it into *The Raiser's Edge*.

