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The Raiser's Edge Homepage & Dashboards Wednesday – August 19, 2009

Please silence your phone line by pressing ***6** or **mute** on your phone

There will be an opportunity at the end of the session for you to un-mute your phone for the Q and A

Please do not place the call on hold

Make the world a better place.

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The Raiser's Edge
Homepage & Dashboards
Wednesday – August 19, 2009

Blackbaud Representative:

Ron Rivers – **Solutions Engineer**

Make the world a better place.

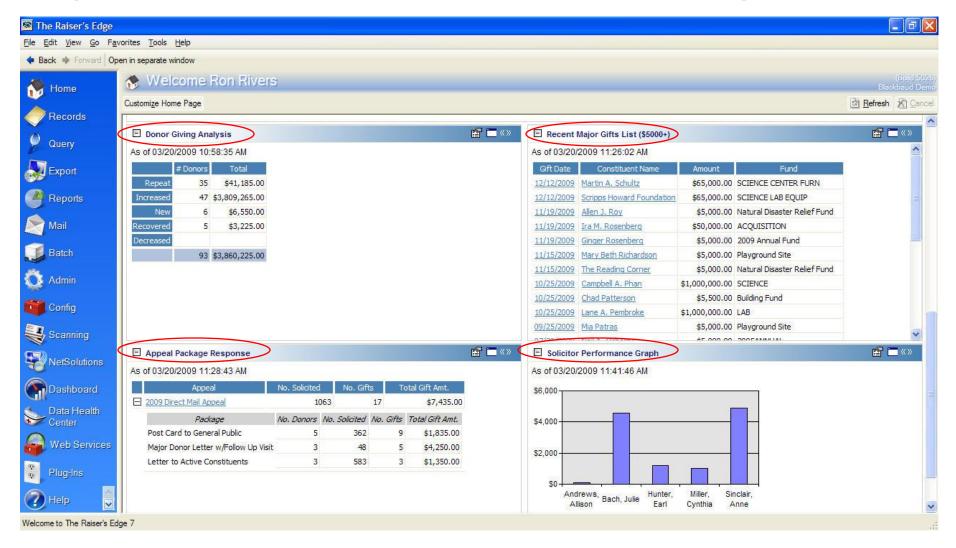# Blackbaud.

Agenda

- Welcome and Introductions
- Organizational Tools Available on the Homepage
- Standard Workflow Procedures
- Customizing the Home Page
- Adding Basic Functions to your Favorites
- Creating & Organizing Favorites
- Creating Dashboards
- Q & A Session

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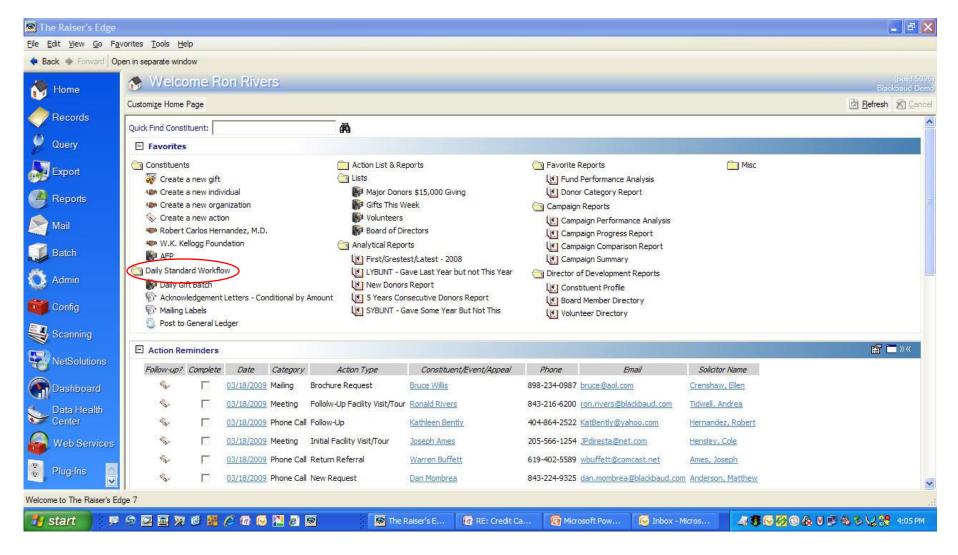
Organizational Tools Available on the Homepage

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Organizational Tools Available on the Homepage

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Standard Workflow Procedures   *Folders*
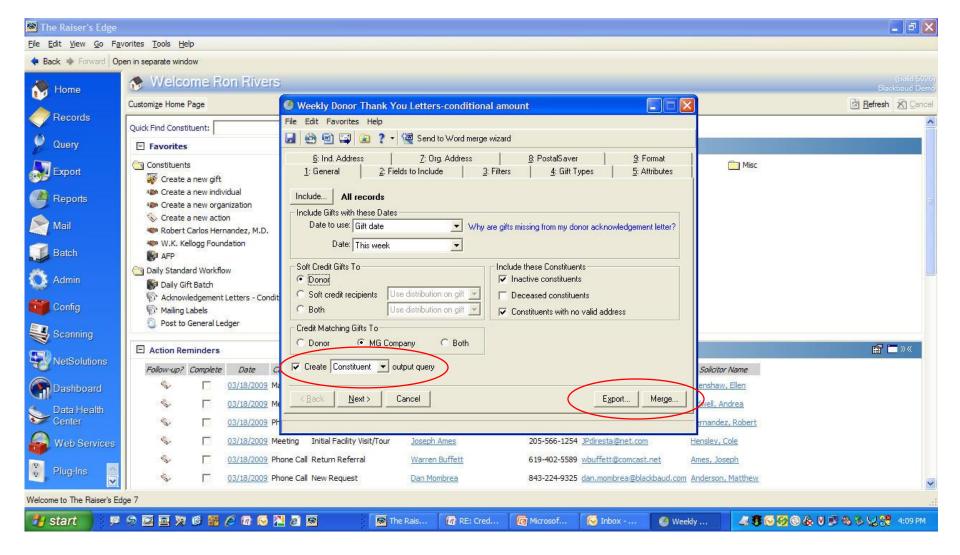
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Standard Workflow Procedures   *Batch Gift Entry*

Standard Workflow Procedures *Acknowledgement Letters*
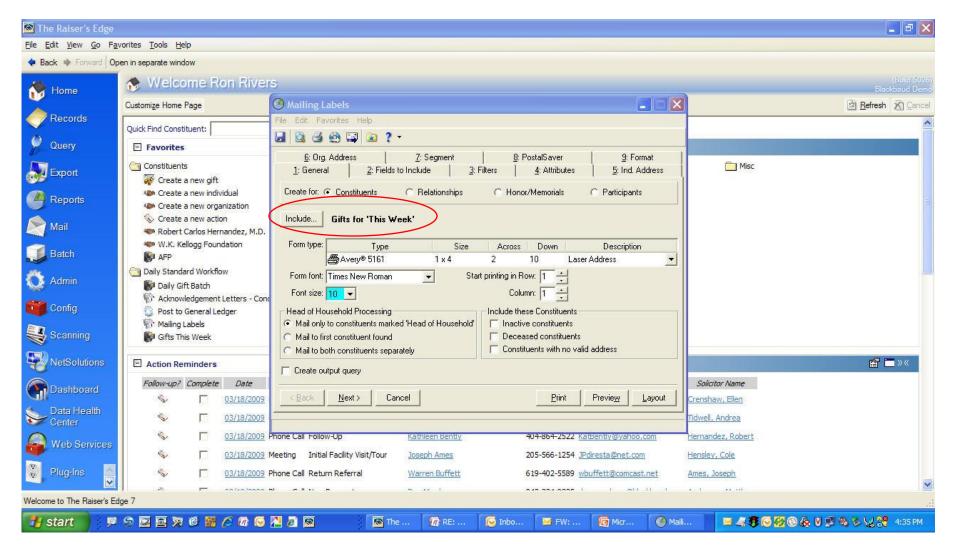
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Standard Workflow Procedures   *Mailing Labels*

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Standard Workflow Procedures   *Post to General Ledger*

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Customizing the Home Page   *Basic Functions*

Customizing the Home Page

Panels

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Customizing the Home Page

Organizing Favorites

Blackbaud News Update

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Blackbaud News
Upcoming Online Trainings

- Managing Tribute Gifts in The Raiser's Edge
  - Dates 8/27, 9/15
  - 2 hours at $160
- RE7 Part I Refresher
  - 8/27, 9/02, 9/15
  - 4 hours at $320
- RE7 Part II Refresher
  - 8/28, 9/03/ 9/16
  - 4 hours at $320

  *All online instructor-led courses are covered by the Blackbaud Training Pass or Distance Learning Training Pass

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Blackbaud News
Raiser's Edge Support

- The Raiser's Edge 7

  - Current release is 7.91

  - Support Main Line 1-800-468-8996

  - Email at RESupport@blackbaud.com

  - Operating hours are 8 a.m. to 8 p.m. EST, 24/7 access available for Advantage Priority Maintenance clients

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Blackbaud News
Software Spotlight: NetCommunity GROW

- Fully Designed Website using "best practice" design and navigation
- Web 2.0 Tools delivering a dynamic, interactive website
- Hosting of your website – access your site from any web browser to make content additions and changes
- Complete Integration with The Raiser's Edge
- Annual Maintenance – 24/7 Knowledge Base, Telephone Support, all upgrades
- E-Mail Subscription – up to 500,000 emails a year using our servers to limit any spam filters allowing for maximum email delivery results
- Reporting Tools using Google Analytics and Raiser's Edge
- Launch Strategy Services
- email Campaign Strategies
- On-Going Analysis and Wellness Checks

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Blackbaud News

Do you need help managing Technology? Blackbaud OnDemand May Be Right For You!

- Keeping up with the Hardware and Software to run applications
  - Periodic hardware purchases and upgrades, ensuring that your system will perform at peak by employing the best technology
  - Upgrades and patches of Blackbaud and 3rd party software ensuring you are always on the latest version
- Knowledgeable resources, staff, and support
  - Implement changes when changes are needed
  - Perform regular tasks like back-ups and upgrades
  - Have expertise in <u>both</u> the application and infrastructure
- The right solution for Remote Access
  - Employing the right technology that simplifies access to your data while you're in <u>or</u> away from your office
  - Getting to your data when you need, and performing the right tasks and functions
- Focus on your mission, not the technology. Blackbaud can help you remove these responsibilities from your plate with outsourced solutions.

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Better Supporting You
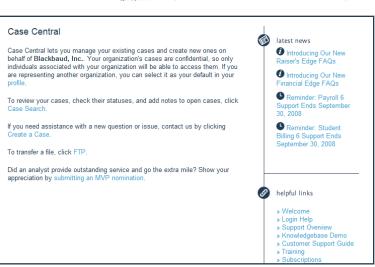## Support Resources Online

- Customer and Product Support
  - User Forums
  - Technical Bulletins
  - Shared Documents
    - Downloads

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Customer and Product Support

Blackbaud offers three levels of world-class support to assist your staff with questions and ensure that your solution achieves peak performance.

Support benefits include:

- Unlimited Toll-free telephone access to the Call Center with 200 people

- Email support

- Electronic access to Case Central and Support Central Knowledgebase

- Web-based issue tracking of open cases

- Software updates

- Third-party product support (e.g. MS Office Integration)

- Dedicated account managers and calling queues (premium service)

- Weekly technical bulletins

- Regional user groups

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User Forums

- Users from all over the world

  - Forums are categorized by software (RE 6, RE7)

- Topics are broken out by activity (Mail, Gift Entry)

Online: Select Support, Forums

Support Bulletins

- Newsletters for RE, FE, and EE
- Sent weekly via email
  - Hot topics, under-used tips
  - Subscribe Online

THE*User'sEdge*
your newsletter about The Raiser's Edge®

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May 2008

April showers bring May flowers, and what do May flowers bring? No, not pilgrims - it's the new edition of The User's Edge! This month's edition features helpful query tips, daring adventures in demographic reporting, and a bag overflowing with helpful import tricks! Have a suggestion for a future issue? Let us know by emailing usersedge@blackbaud.com.

Favorite Fields
If you create a lot of queries, you probably find yourself selecting many of the same fields over and over again. Rather than taking the time to drill down to each field each time your run a query, you can add fields as favorites by right-clicking on a field and selecting "Add to Favorites." Read more.

Merging Queries
Sometimes query logic is too convoluted and trying to create one query to group all of the records you need is an exercise in futility. Fortunately, by creating two queries and merging them, you can group the records you want. Simply create one query that includes the criteria you want your records to have, and create a second query with all of the records you want to exclude from the first group. You can then merge the queries using the SUB operator, and only the records you need will be left standing. Read more.

Customer Support Hours
Monday, May 26, is a United States holiday. Customer Support will operate with a reduced staff. In observance of Memorial Day, Customer Support will be closed Monday, May 26.

Forum Poll
We are looking at ways to recognize those community members who are our top contributors each quarter. To express your opinion, vote in our forum recognition poll. Thanks for your feedback!

Online: Select Support, Support Newsletters

Shared Documents

- Support Forum Documents

- Data Loss and Backup Mishaps

- Crystal Reports

- Development Office Letters and Forms

- Sample Import Files

- Information Request Forms

- Policies and Procedures Manuals

Online: Select Support, Forums, Client Documents

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Downloads

- Latest update – on demand!

- Important Read-me files

- Cumulative Patches

- System Recommendations

Downloads

The following products are available for you to download on behalf of **Blackbaud, Inc.**. Click a product and review the notes, readme, compatibility information, and instructions before downloading the update or patch. To access downloads for another organization, select it as your default in your profile. To troubleshoot download issues, review BB91094.

Subscribe to be notified the day after we release product updates or cumulative patches (BB337448).

ⓘ For products that are hosted by Blackbaud, contact Blackbaud OnDemand Support to request an update. Updates must be run on our server and cannot be run on your machine.

Accounting for Nonprofits 6.42.512 and Patch

AddressAccelerator for Canada

AddressAccelerator for the United States

Admissions and Registrar's Office 6.8.3.22

Advanced Budget Management 5.17.10.1

BDN

Blackbaud Direct Marketing 1.3.101 and Patch 4

Blackbaud Download Test

Blackbaud NetCommunity 5.1 with Patch 13

Blackbaud Student Information System 7.75.259 and Patch 6

eRequisitions for The Financial Edge 7.75.259

Online: Select Support, Downloads

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Important Contact Information

Support 1-800-468-8996
resupport@blackbaud.com
http://www.blackbaud.com
http://kb.blackbaud.com
http://www.techsoup.com
http://www.journeyed.com

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Questions?

For more information:

Contact your account manager

Phone: 800-443-9441

Email:

solutions@blackbaud.com

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