

Blackbaud

**BLACKBAUD
ONLINE USER CLINICS**

Log on, Listen, and Learn

Make the world a better place.

**The Raiser's Edge Online User Clinics:
Mail Merging
May 20, 2010**

Host: William Jankins, Solutions Engineer

Q&A and Technical Assistance

To submit a text question:

- 1) Click the 'Q&A' pane
- 2) Type your question
- 3) Click the 'Ask' button

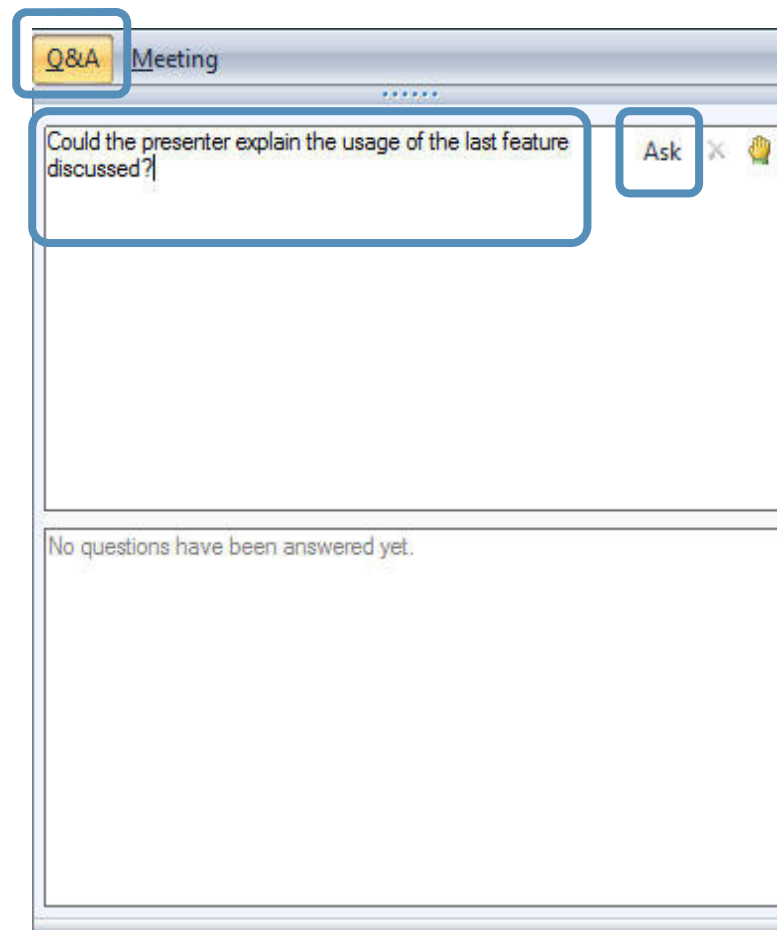
Note: Use the scroll button to scroll to your answer if necessary.

For technical assistance connecting:

Intercall: 800.374.1852

Live Meeting: 866.493.2825

Note: These numbers are for technical assistance. They are not the call-in numbers to listen to the event.



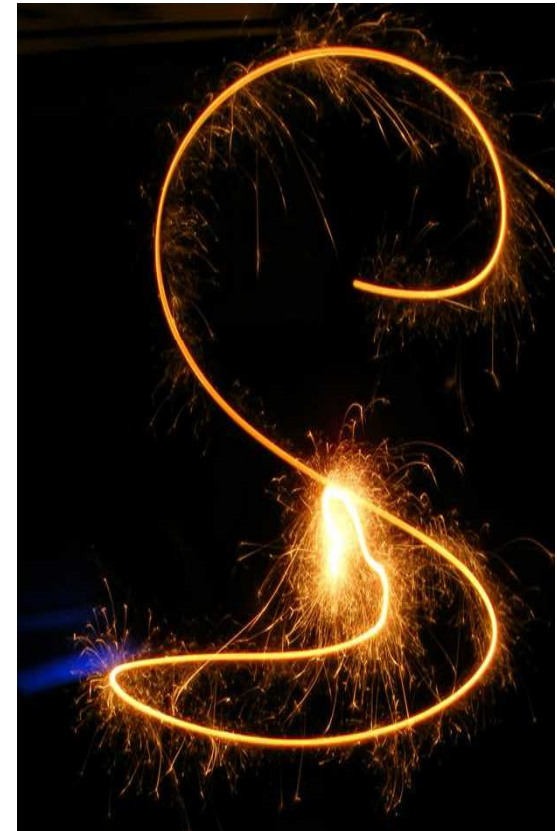
Agenda

- Welcome and Introductions
- Blackbaud News and Updates
- Mail Merging Presentation
- Upcoming Web Events
- How Blackbaud Can Help
- Q&A



Blackbaud NetCommunity Spark™

- Blackbaud NetCommunity Spark is a new online marketing and membership solution that ignites your website!
- Spark seamlessly integrates with The Raiser's Edge
- Bring your website to life with:
 - Unmatched online membership and fundraising tools
 - Email marketing to help drive new & renewing support
 - Online event management and registrations
- Join us for a free web seminar: Ignite Your Website with Blackbaud NetCommunity Spark
 - May 26th at 2:00 p.m. ET
 - June 9th at 2:00 p.m. ET



Blackbaud Learn™

- Blackbaud Learn is an annual training subscription offered in tiered packages to best serve your training needs:
 - Learn
 - Learn More
 - Learn Everything

- Training is available for the following solutions:
 - The Raiser's Edge 7
 - The Financial Edge
 - The Education Edge
 - Blackbaud NetCommunity
 - Blackbaud Sphere



Blackbaud Learn™

Get the most out of your solutions with Blackbaud Learn!

- ✓ Live classes on software skills (online and classroom)
- ✓ Live lessons on best practices and nonprofit strategies
- ✓ Role-based curriculum for specific skill sets
- ✓ Exclusive Q&A office hours with experts each month
- ✓ Self-paced and on-demand classes available online 24/7
- ✓ Constantly evolving curriculum
- ✓ No travel costs or hassle for more than 95% of classes
- ✓ Monthly training newsletter with new class alerts, tips and tricks

View the course catalog online at www.blackbaud.com/training.

Blackbaud Application Hosting™

- **Security:** World-class security measures that employ 24/7/365 system monitoring
- **Uptime Guarantees:** 99.9% or better uptime – applications are always available and designed to perform at the optimal level
- **Disaster Recovery:** Immediate access to key business applications, even when unforeseen events pose an obstacle or threat
- **Cost Control and Savings:** Subscription-based services make IT costs steady and predictable
- **Remote Access:** Access your Blackbaud software anytime, anywhere via a web browser
- **Availability:** Host The Raiser's Edge, The Financial Edge, Blackbaud NetCommunity, The Education Edge, Faculty Access for the Web, NetClassroom, Student Information System, The Patron Edge Online, Blackbaud Enterprise CRM, Blackbaud Direct Marketing, and The Researcher's Edge



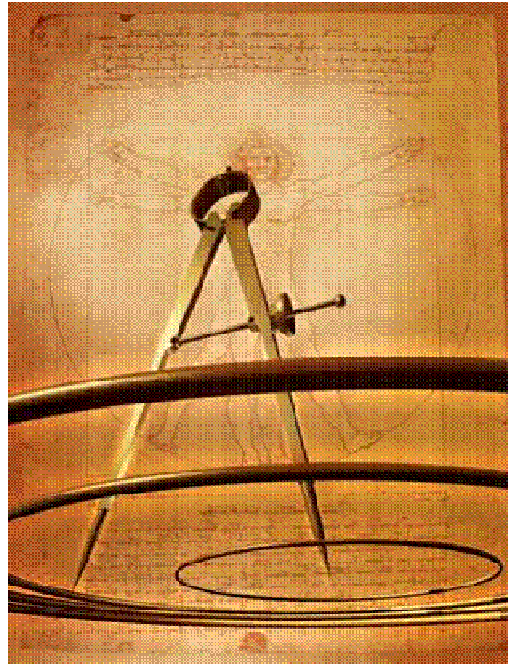
- Blackbaud's Conference for Nonprofits is the premier nonprofit event of the year. This two-day professional development and networking event is perfect for anyone who works in the nonprofit community.
- [October 20 – 22, 2010](#)
[Gaylord National Hotel and Convention Center](#)
[Washington, D.C.](#)

LEARN MORE ➤

OCTOBER 20-22 | WASHINGTON, D.C.

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Mail Merging in RE7



Hosted by: William Jankins
Solutions Engineer/ Product Expert

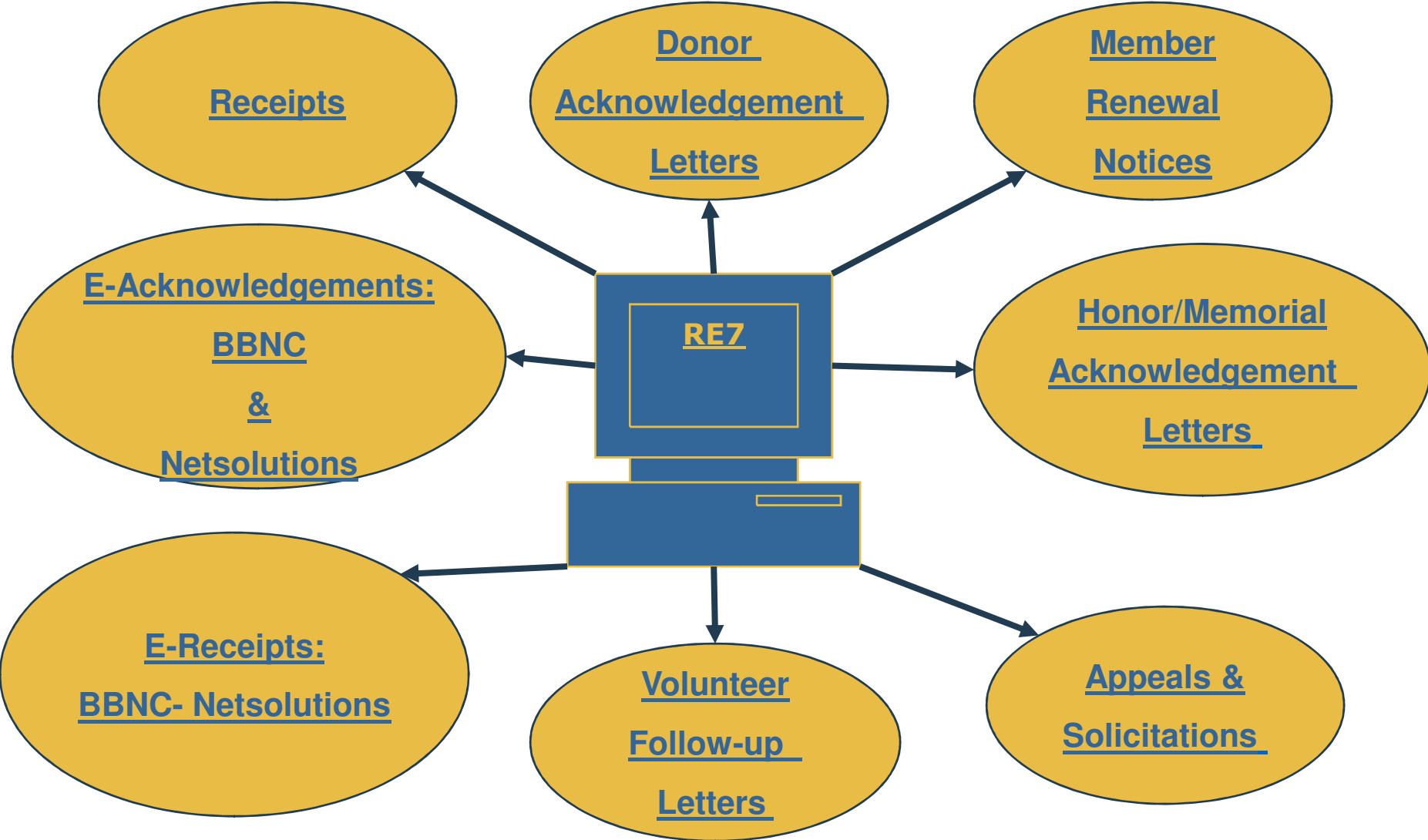
Mail Merging in RE7 :Work Smarter... Not Harder!

Hosted by: William Jankins
Solutions Engineer/ Product Expert

Mail Merging in RE7

1. **Common Tasks**
2. **Simple Mail Merge**
3. **Conditional Mail Merge**
4. **Using Logical Dates**
5. **Using the Home Page**

1. Common Mail Merge Tasks



2. Simple Mail Merge

Used in Export or Mail modules.

Knowledgebase tips:

BB151232 – Simple Versus Conditional Mail Merge

BB92696– How to create a Simple Mail Merge

BB97660 – Simple Mail Merging in Export

3. Conditional Mail Merge

Used in Export or Mail modules:

Knowledgebase tips:

BB151232 – Simple Versus Conditional Mail Merge

BB97661 – How to create a Conditional Mail Merge

BB97809 – Conditional Mail Merge in Export

Acknowledging Donors – Mail Merge

See BB97661 or access the [The Raiser's Edge & Microsoft Office Integration Guide](#)

(Help, User Guides) for more information.

Donor Acknowledgement Letters for Robert

File Edit Favorites Help

Send to Word merge wizard

6: Ind. Address 7: Org. Address 8: Postal 9: Format

1: General 2: Fields to Include 3: Filters 4: Gift Types 5: Attributes

Include... **Robert Hernandez**

Include Gifts with these Dates:

Date to use: Gift date

Date: <Specific range> Start: 01/14/2004 End: 01/14/2004

Soft Credit Gifts To:

Donor

Soft credit recipients Use distribution on gift

Both Use distribution on gift

Include these Constituents:

Inactive constituents

Deceased constituents

Constituents with no valid address:

Credit Matching Gifts To:

Donor MG Company Both

Create Constituent output query

< Back Next > Cancel Export... Merge...

4. Use Smart Dates & the Home Page

Include Gifts with these Dates

Date to use: Gift date

Date: This month

Edit Field Criteria

Gift Date

Operator: equals

Date: <Specific date>

Value:

- Tomorrow
- This week
- Last week
- Next week
- This month
- Last month
- Next month
- Month to date

- Give others access to the information they need
- Improve internal communication
- User just needs to know how to click a link

5. Homepage – Customize your Home Page!

- Access commonly used tasks
- Organize in folders
- One-click access to information



Question-and-Answer

The Raiser's Edge Online User Clinics

Topic	Date
Homepage and Dashboards	1/21/10
Database Cleanup	2/18/10
Batching and PCI Compliance	3/18/10
Querying	4/15/10
Mail Merging	5/20/10
Action Tracks and Moves Management	6/17/10
Reporting	7/15/10
Database Cleanup	8/19/10
Tracking Solicitors and Appeals	9/16/10
Importing	10/21/10
Split Gifts and Soft Credits	11/18/10
Security and PCI Compliance	12/16/10

Upcoming Web Seminars

- Activate Online Marketing & Engagement: An Overview of BBNC Grow
 - June 16th at 1:00 p.m. ET

- The Financial Edge for Raiser's Edge Customers
 - June 2nd at 2:00 p.m. ET

- Getting to Know AuctionMaestro Pro
 - May 26th at 2:00 p.m. ET
 - June 30th at 2:00 p.m. ET

- For a schedule of all upcoming web seminars or to register, go to www.blackbaud.com/webinars.

How Blackbaud Can Help

Contact Blackbaud Support for more information on:

- Additional Modules: Multiple module purchases and bundled training
- Training Services: Blackbaud Learn™
- Hosting Services: Blackbaud Application Hosting™
- Consulting Services: Conversions, customizations
- Data Enrichment Services: Identify, rate, and qualify your best prospects

Email resupport@blackbaud.com or call 800.468.8996 for assistance.

Blackbaud

Questions?

For more information:

Contact your account manager

Phone: 800-443-9441

Email:

solutions@blackbaud.com

Thank You for joining us!



Make the world a better place.