

# New Features and Enhancements



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***The Raiser's Edge Enterprise 7.93*** includes the new Duplicate Constituent Management Tool, as well as improvements to other features within program such as *Query*, *Batch*, and *Security*. This chapter includes an overview of all the new features in ***The Raiser's Edge***.

## Constituent Records

To manage duplicate records in your database, you can run a scan with the Duplicate Constituent Management Tool to display all potential duplicates. You can then merge and delete records to clean your database, all from one screen.

When you add a new address to a constituent record, you now have the option to copy all phone and email information.

# Duplicate Constituent Management Tool

You can use the Duplicate Constituent Management Tool to scan your database for duplicate constituent records. After the scan is complete, you can review potential duplicate records and either merge records to remove the duplicate, or indicate that the records are not duplicates and should never be matched again.

The screenshot shows the 'Duplicate Constituent Management' application window. On the left, a table lists potential duplicates. The main area displays a side-by-side comparison of two records for 'Jill Madeline Garrett'.

Name	Possible Duplicates
Jill Madeline Garrett	1

Master Record	
<a href="#">Jill M. Garrett</a>	<a href="#">Jill Garrett</a>
Date Added: 1/21/2000	Date Added: 6/16/2000
Date Last Changed: 3/5/2012	Date Last Changed: 10/15/2004
<input type="button" value="Merge into Master Record"/>	
<input type="button" value="Not a Duplicate"/>	

Biographical	
ID:	8830
Title:	Ms.
First Name:	Jill
Middle Name:	Madeline
Last Name:	Garrett
Suffix:	
Nickname:	Jilly
Gender:	Female
Birth date:	2/16/1985
Marital status:	Single
Spouse:	

Address	
Type:	School Residence
Address:	45 Worthy Avenue
City:	Cheshire
State:	CT
ZIP:	06410
Country:	United States

Phone/Email	
Type:	School/College
Number/Email:	203-555-9985
Type:	Home
Number/Email:	203-555-8712

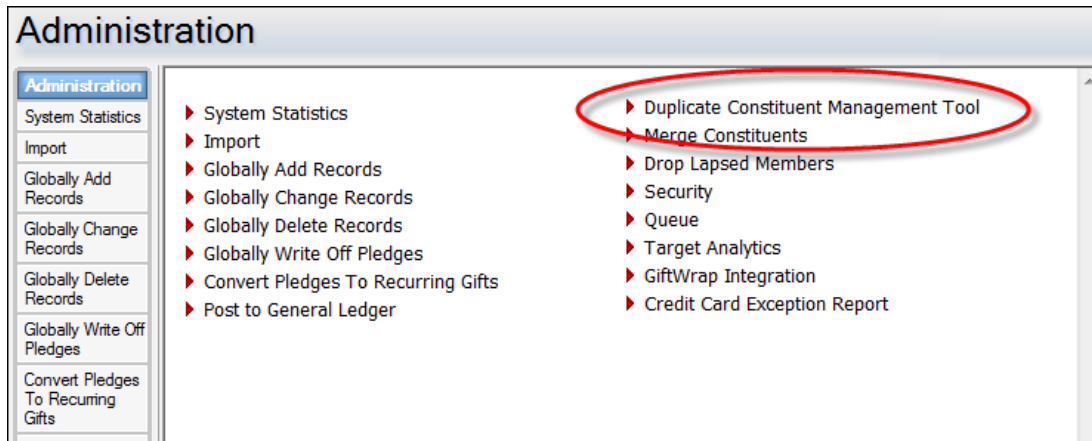
  

Aliases	
Type:	

Total number of potential duplicates found: 2

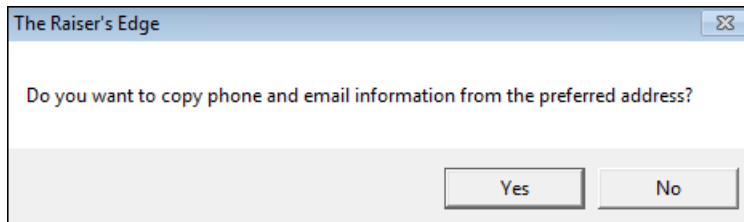
**Note:** You can still run the Duplicate Constituent Report. To run the report, Duplicate Constituent Management screen, click **File**, and select **Preview**. Click **Report**. The Duplicate Constituent Report is run.

To access the Duplicate Constituent Management Tool, from *Administration*, click **Duplicate Constituent Management Tool**.



## Copy Phone and Email Information

When you add a new address to a constituent record, a prompt now appears to ask if you would like to copy all existing phone and email information to the new address.

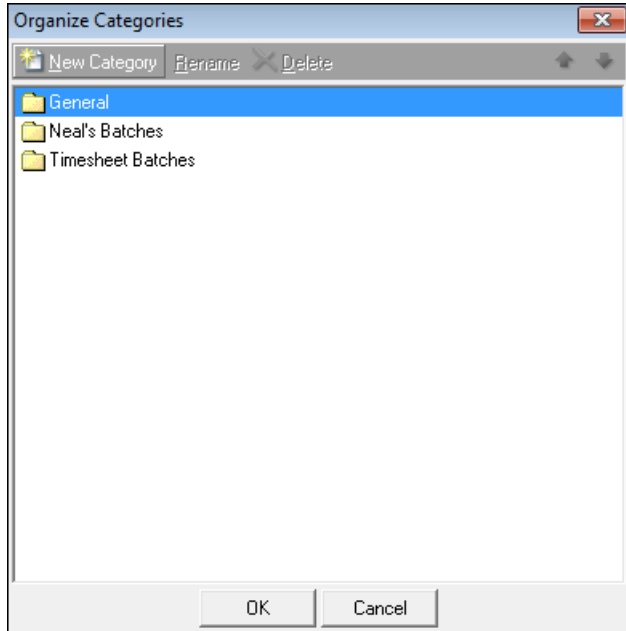


## Fuzzy Birth Date

You can now enter fuzzy dates in birth date fields. For example, if you know the constituent's birth month and day, but not the year, you can enter that information. When you enter a year, you must always use four digits.

# Batch

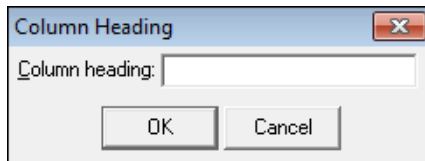
To help manage and organize the batches you create, you can create categories in which to group them, such as by user or by the batch's intended use. To create and organize batch categories, select **Organize Categories** from the menu bar of the Batch page. On the Organize Categories screen, you can create, rename, and delete batch categories. You can also adjust the order in which they appear on the Batch page.



# Export

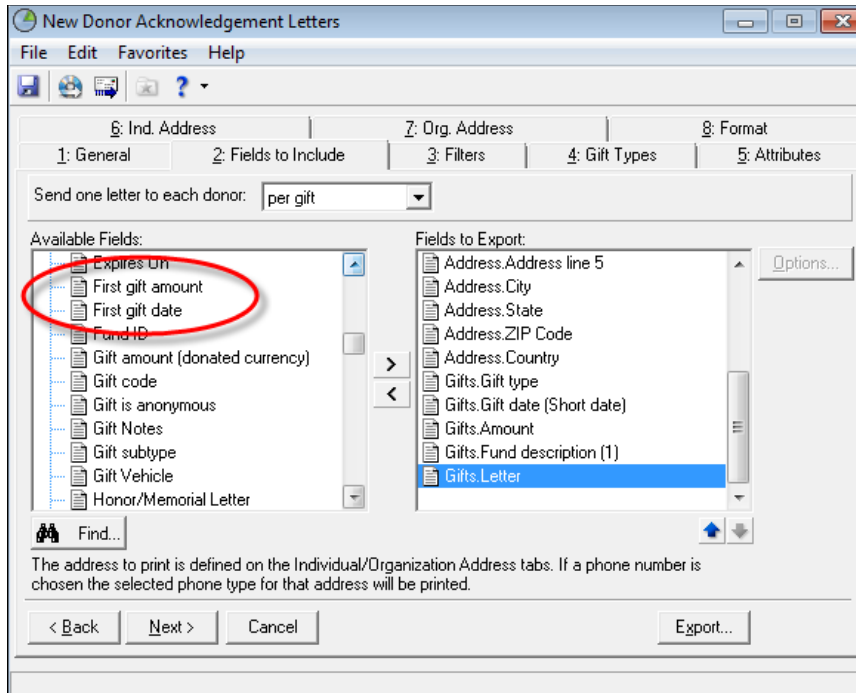
You can now rename export headings to make the columns in the export easier to discern, and more contextually accurate. For example, if you are exporting multiple **Gift Amount** fields, but each has different criteria, you can create descriptive column headers to make them easily discernible in the output.

To edit the column heading, from the Output tab of the export, right click the column heading to rename in the **Output** grid, and select **Column Heading**.



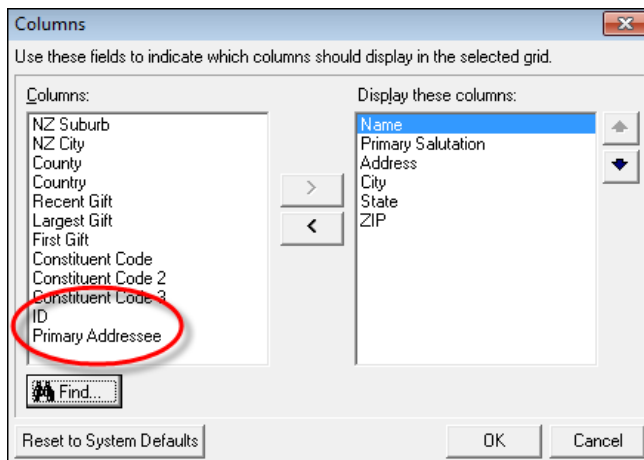
# Mail

To help personalize letters, the **Last Name**, **First Gift Date**, **First Gift Amount**, and **Last Gift Date** fields have been added to Donor Acknowledgement Letters and Quick Letters. You can now use these fields when writing your letters.



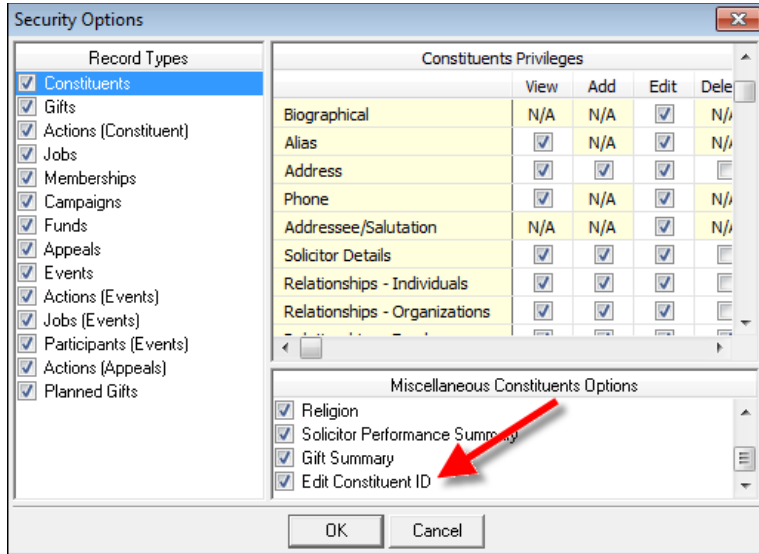
# Query

In the results grid of a query list, you can now select to display primary addressee and constituent ID information. To select to view primary addressee and constituent ID information, from a query list, click **View** on the menu bar and select **Columns**. Move **Primary Addressee** and **ID** to the **Display these columns** grid, and click **OK**.

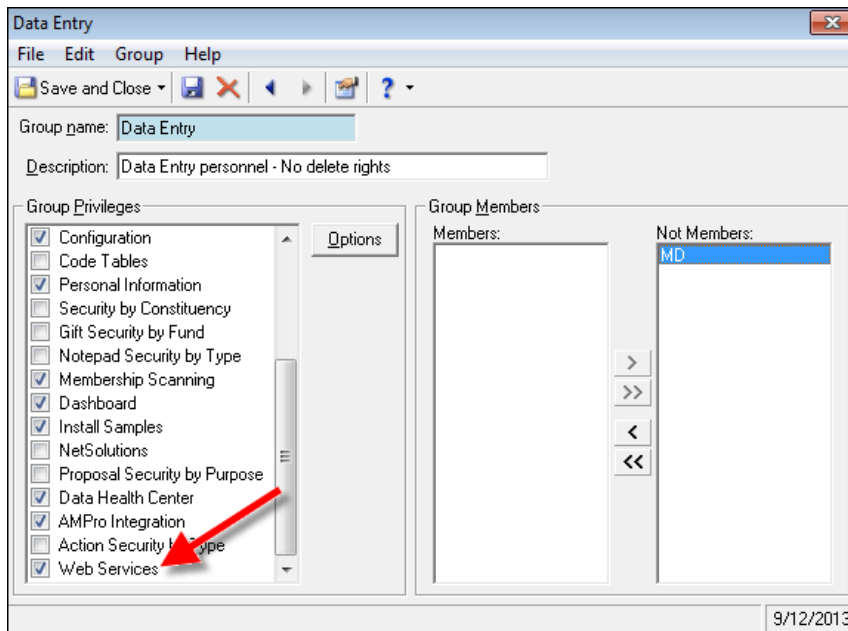


# Security

You can now assign **Edit Constituent ID** rights to users and groups. If you select the **Edit Constituent ID** checkbox in *Security*, edit rights will be enabled for the **Constituent ID** field for a given user. If the checkbox is not selected, the user can view Constituent IDs, but will not be able to edit them.



In *Security*, you can now also select whether or not the *Web Services* module is available to users. By default, *Web Services* is available to non-Supervisors. If users do not have rights to *Web Services*, it will not appear at all when the user is logged in to *The Raiser's Edge*.



# Compatibility

*The Raiser's Edge 7.93* is now compatible with Microsoft SQL Server 2012, Microsoft Windows 8, Microsoft Windows 2012, MapPoint 2013